LinkPoint Connect User Guide: Desktop Plus Edition

Microsoft Outlook & Salesforce Integration

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Overview

About LinkPoint Connect

LinkPoint Connect streamlines data entry and access by enabling users to instantly view CRM data within their email client. Users can record inbound/outbound emails to contacts, leads, opportunities, cases, and custom objects with just a few clicks. Users can also instantly create new contacts from an email signature with simple drag-and-drop functionality, eliminating manual data entry. Smart Forms make it easy to create or update CRM fields and records based on CRM page layouts without leaving the email client. LinkPoint Connect synchronizes calendars, contacts, and tasks to the CRM directly from the email application, and robust configuration options let users control how and which data is recorded and synced.

About LinkPoint Connect Editions

Organizations and individual users work differently in their email client and can have different CRM integration needs. Different teams will work differently with the CRM or have different data access and input needs. And different users will have different ways or platforms by which they need to engage with their CRM data.

LinkPoint Connect Editions were designed to meet client need across a variety of use cases. Download our Fact Sheet for examples and common reasons why customers choose one (or more) Edition for their email integration.

- Desktop Edition: Classic for PC users. Record emails, create new contacts or leads, and automate synchronization of contacts, calendars, and tasks between your email application and CRM.
- Desktop Plus Edition: Everything from Desktop Edition... Plus you can add meeting notes and entries to Salesforce fields from the Side Panel or a dedicated mobile app.
- Cloud Edition: Server-side version for mobile & cross-platform users. Nothing to install, admin controls available. Works for Mac, Mobile, and PC users.

Contact your Account Executive or sales@linkpoint360.com to discuss the best fit for your organization.

Additional Documentation

This User Guide demonstrates functionality specific to the Desktop Plus Edition of LinkPoint Connect. For a complete guide to all LinkPoint Connect features, download the Desktop Edition User Guide.

A Note about Software Upgrades

Products and services provided by LinkPoint360 are automatically updated by default. Individual users may, in most cases, change their update preferences within LinkPoint Assist. Some organizations may request that upgrades be disabled by default and then manually released at the discretion of internal IT teams. If you see new features or functionality listed but do not see the new features in your instance of LinkPoint Connect, please contact your System Administrator.

Configuring Desktop Plus Edition

Understanding Desktop Plus Edition and Meeting Recap

Desktop Plus Edition includes all of the LinkPoint Connect email integration features with the added support for logging meeting notes via the Meeting Recap feature in the Side Panel and a dedicated mobile application. The Meeting Recap functionality enhances the business value of client interactions by capturing critical meeting intel from teams via mobile devices and desktop computers.

Meeting Recap makes users more productive by simplifying the feedback process, and integration with Salesforce and Microsoft Exchange eliminates the need to search for meetings or return to the CRM to manually enter data. And the data captured fits the format companies need for reporting and compliance.

Functionality highlights include:

- **Predefined Workflows:** Admins choose the questions and answers they want users to access.
- **Mobile App:** Users install the LinkPoint Connect app on their mobile device.
- **Side Panel:** Users with LinkPoint Connect installed in Outlook can launch Meeting Recap from the Side Panel.
- **Integration:** The content entered by users is synchronized to the related Salesforce records and fields.
- **Summaries:** Admins receive a Meeting Recap Summary once each Meeting Recap is complete for enhanced visibility into team interactions with prospects and customers.

Initial Setup

Meeting Recap is driven by a core set of questions and answers designed to capture consistent, accurate feedback. As part of the implementation process, Admins review and finalize the questions and answers that are exposed to users to customize the experience. In order to proceed, Admins must review and complete the Implementation Plan provided by LinkPoint360 Professional Services. Once final, the Meeting Recap icon is added to the Side Panel in Outlook (as needed) and instructions for mobile app access are provided. With all settings in place, Admins can invite their users who will receive an email with instructions to complete a setup wizard.

Connecting to Hosts

Meeting Recap prompts users to answer predefined questions using standardized answer options. The answers to these questions are then pushed to Salesforce as part of the integration. In order for the data to sync to Salesforce, each user must enter their Salesforce credentials in the Desktop Plus Web Portal. For customers who implement the optional integration with Microsoft Exchange calendars, each user must enter their Exchange credentials as well.

Completing a Meeting Recap

Connected users can submit Meeting Recap data as needed, reviewing the questions provided and selecting from predefined answer choices. Admins can configure Meeting Recap to present the same questions to all users for all scenarios or develop custom or conditional questions for different records types, activities, or teams. The answers are captured and then synced back to Salesforce fields and manager summaries.

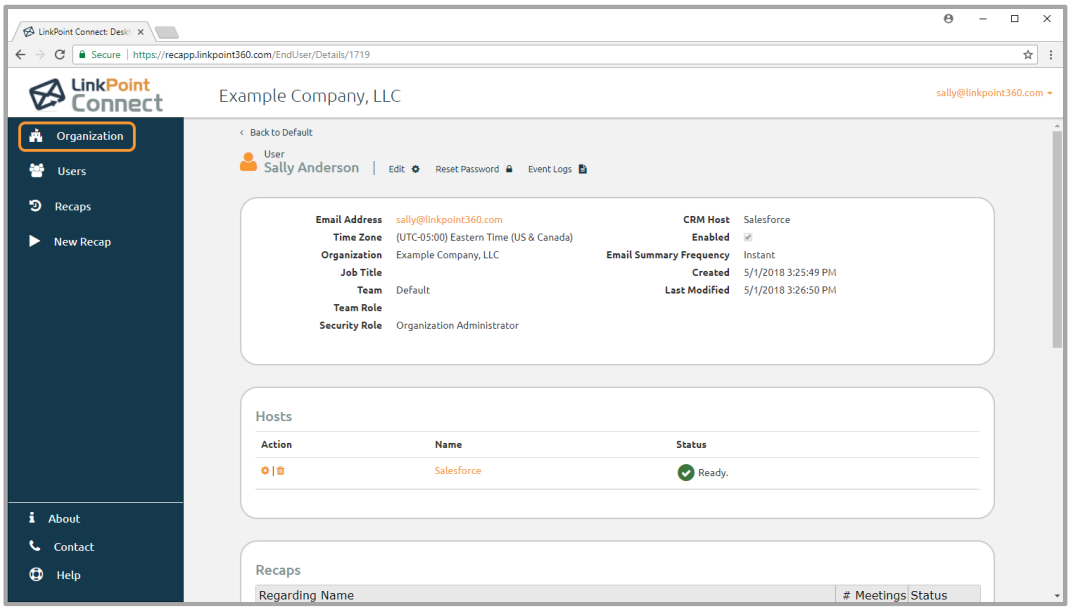
Inviting Users from the CRM

Desktop Plus Admins can invite groups of users by using the Import from CRM option. Admins can use this feature to include users that already exist in Salesforce, cutting down on data entry and manual user management. In this section, you will learn how to add new users using the CRM import option.

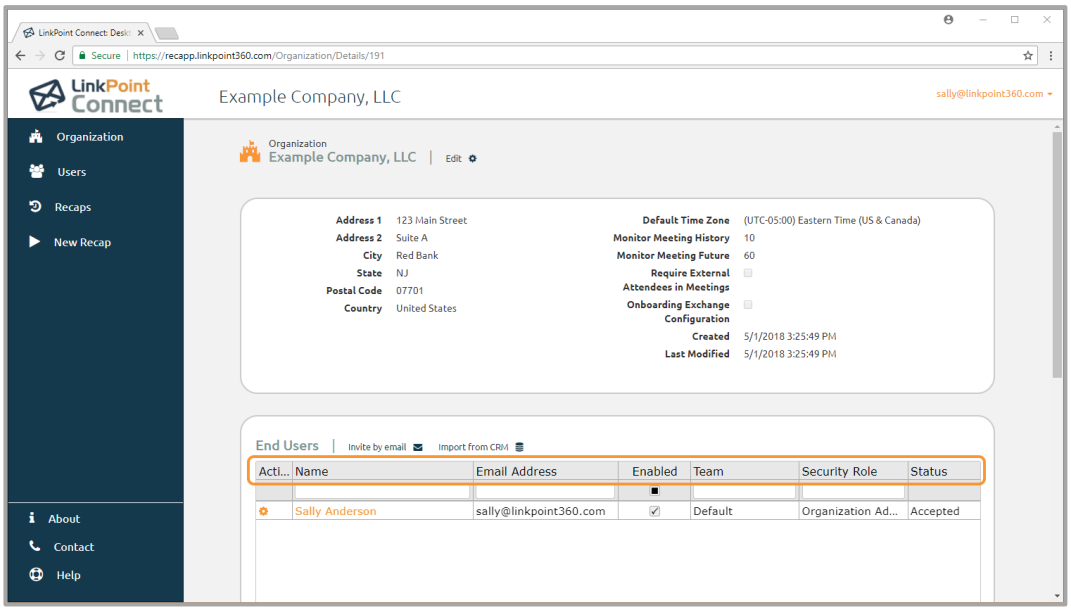
Admin Only: This article outlines functionality available only to Desktop Plus Admins. Standard Users should advance to the next article in this User Guide.

Warning: We highly recommend that you do not invite any users to the account until your question decks and answers are complete as part of the initial implementation for your account. Once users have access to Meeting Recap, they will be able to configure their own Profiles, download the mobile application, and begin to submit Meeting Recaps. Inviting users prior to finalizing the question decks can cause confusion and result in inaccurate or inconsistent data capture.

1. Log in to Desktop Plus and select **Organization** in the left navigation.

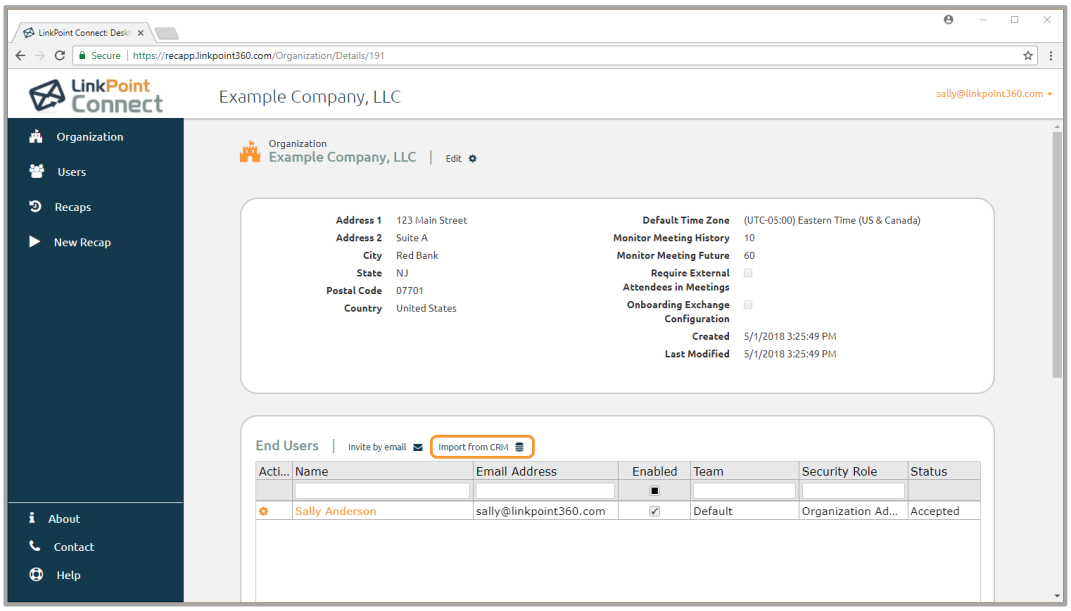


2 Locate the **End Users** section and note the available data columns. You can click on the column headers to sort the data by either Name, Email Address, Enabled, Team, Security Role, or Status.



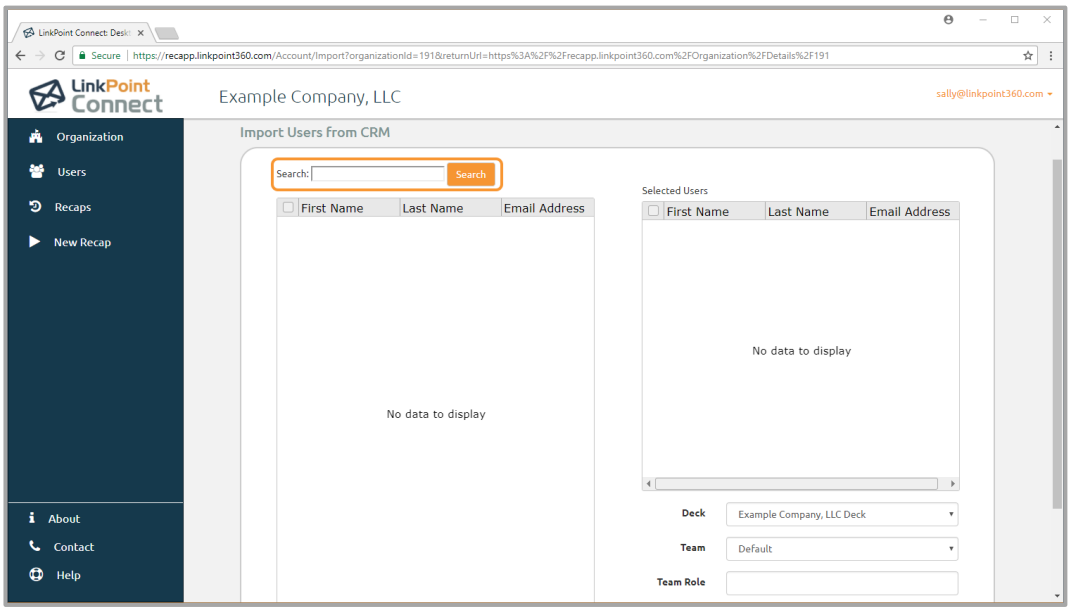
Tip: For first-time access and setup, the only User listed will be the Organization Administrator.

3 Select the **Import from CRM** option.

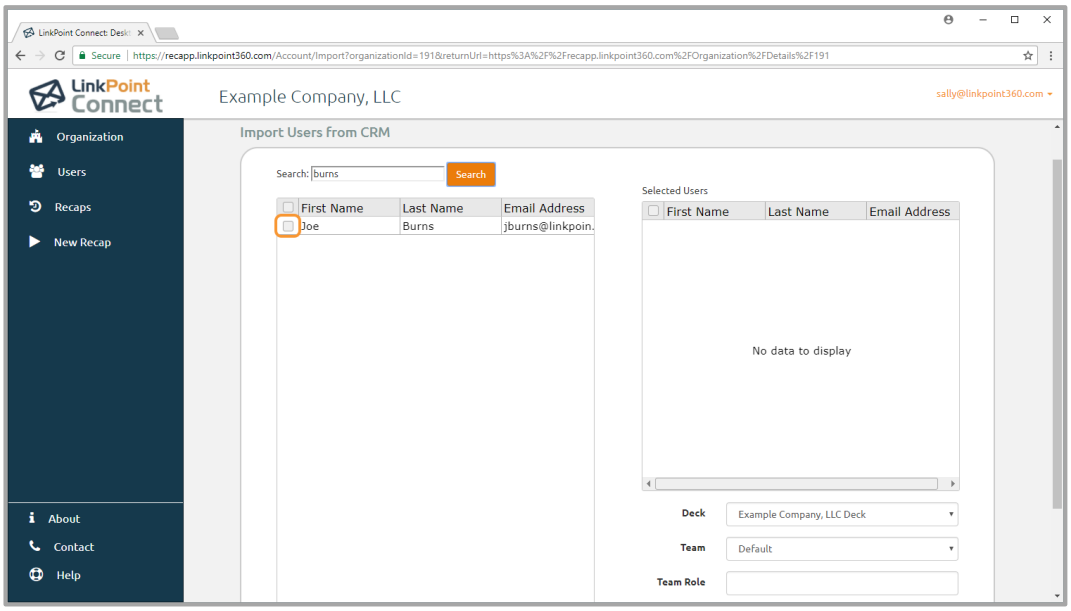


Tip: You will need to make sure you are connected to Salesforce in order to proceed with the import.

4 Enter criteria in the **Search** field, and click the **Search** button. You can search by name or by a Salesforce Profile.

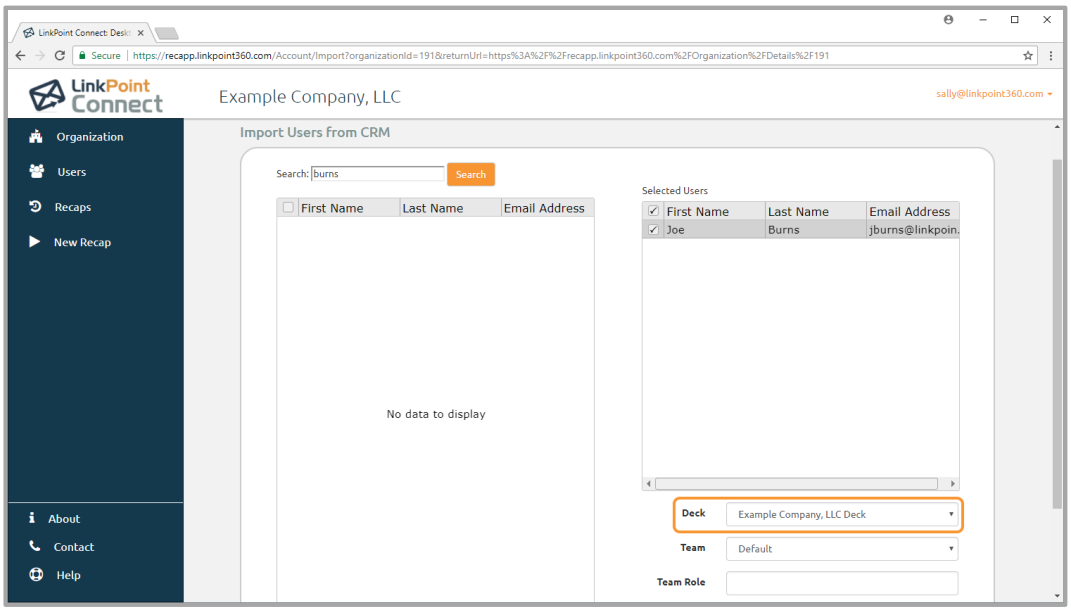


5 Select the checkbox for each user you want to invite. Click the checkbox at the top of the column to select all listed users. This will move the selection to the **Selected Users** table on the right side of the screen.



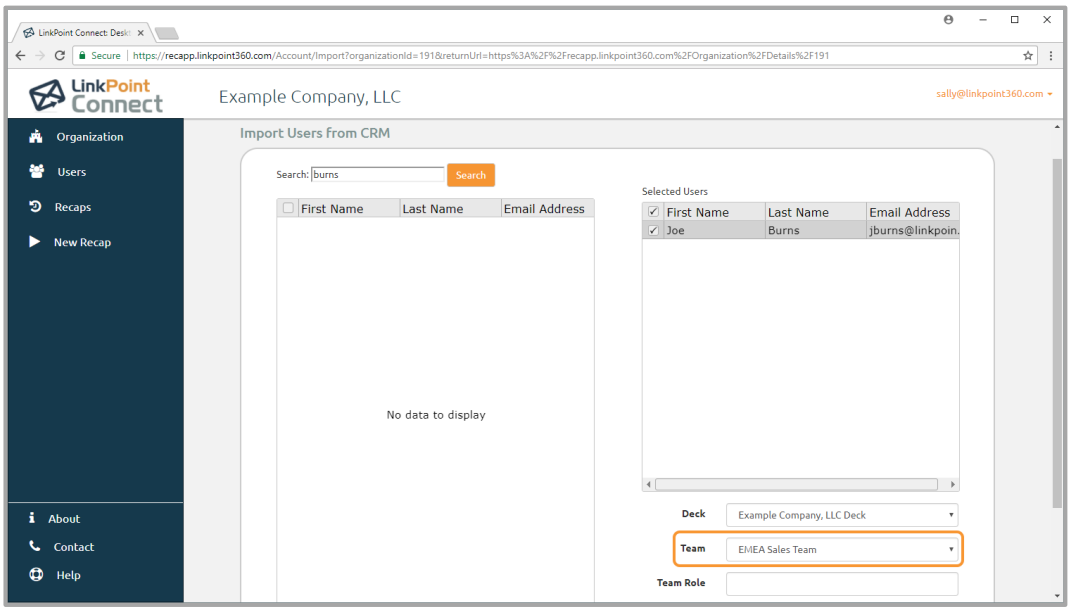
Tip: Importing users by Profile is especially useful if all members of the Salesforce Profile will be assigned to the same Desktop Plus Edition Team.

6 Select the **Deck** for all of the selected users to have access to when entering their meeting notes.

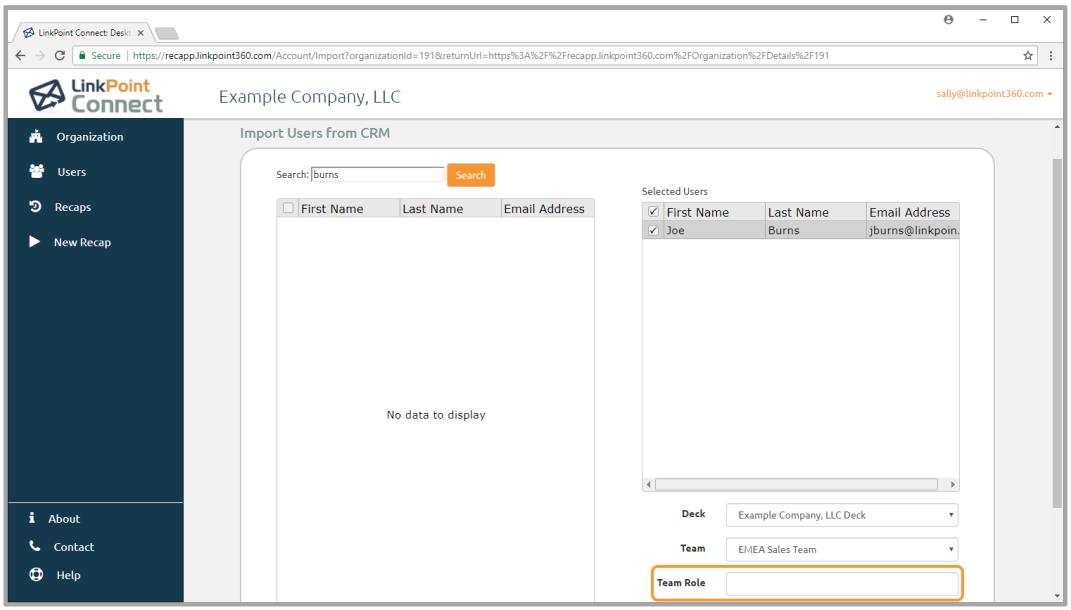


Tip: Decks are sets of questions and answers used with Meeting Recap. These are configured during the implementation process. Depending on your configuration, you have may have multiple Deck options.

7 Select the **Team** that you want to assign to all of the Selected Users.



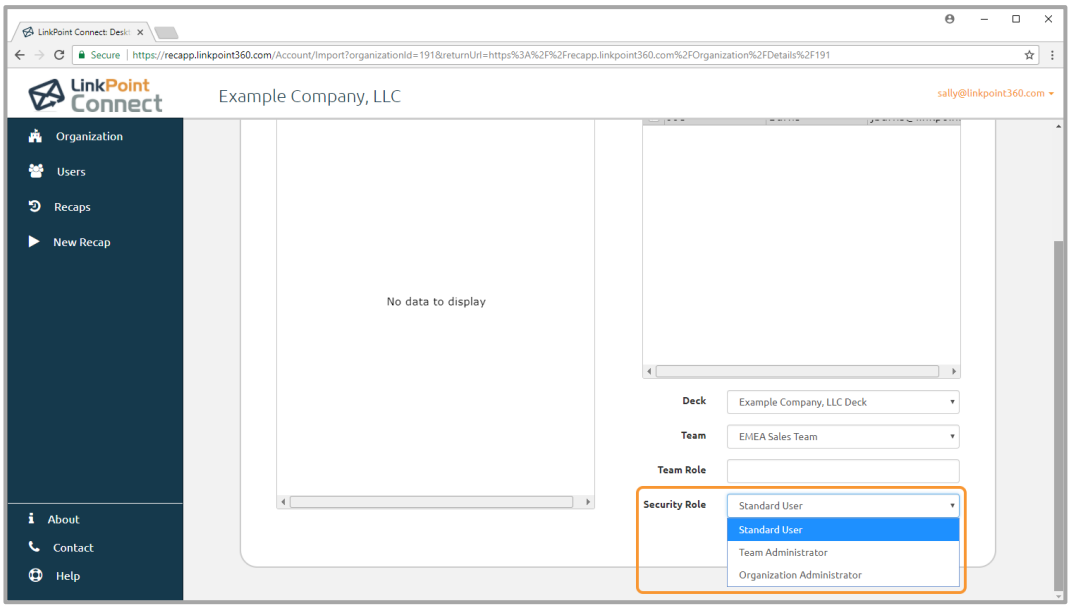
8 Enter the **Team Role** that you want to assign to all of the Selected Users.



Tip: The same Team Role may not apply to all of the users on a specific Team. You can leave the Team Role blank for the import process and manually assign each Team Role to the users as applicable. Alternatively, you can import a smaller batch of users so that only users who should be on the same Team *and* the same Team Role are selected.

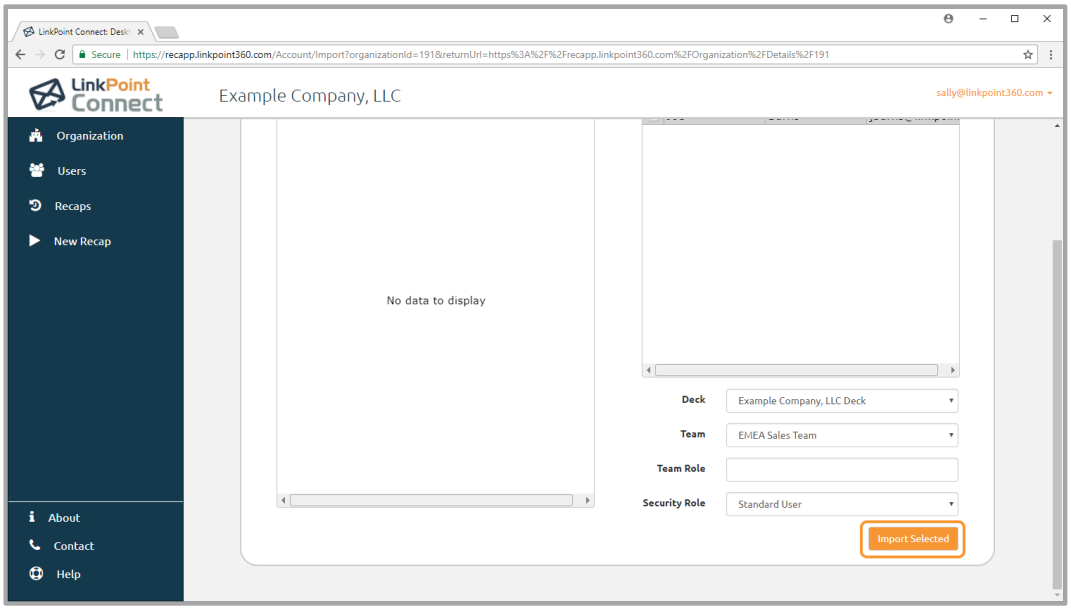
Additional Resources: Refer to the **Reviewing Organization Options** section of this User Guide for more information.

9 Select the **Security Role** that you want to assign to all of the Selected Users.



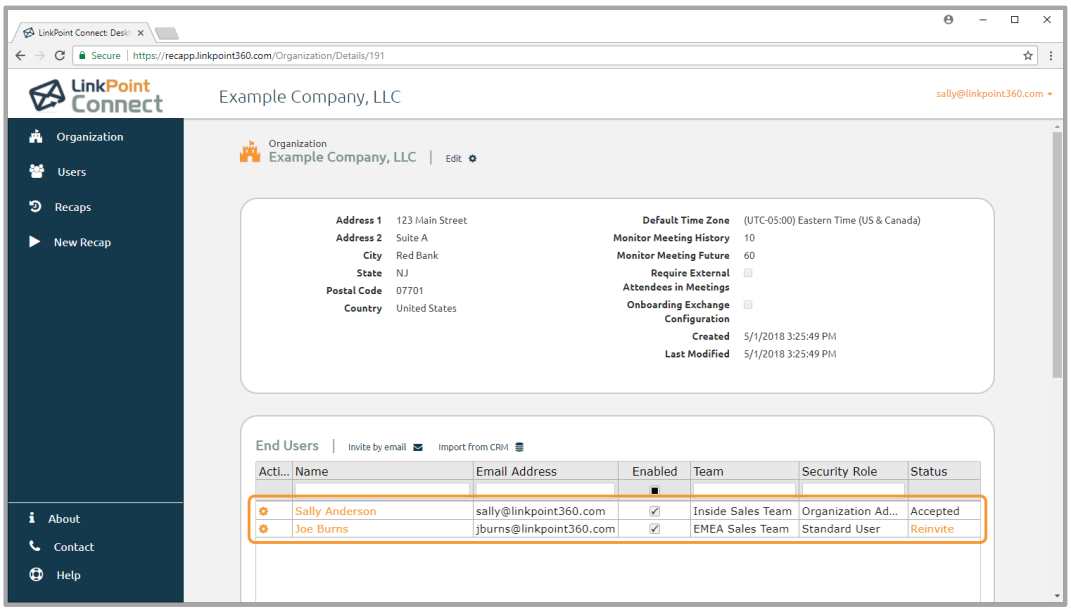
Tip: The same Security Role may not apply to all of the users on a specific Team. The majority of your users should be assigned the Standard User Security Role. If you are importing an entire team, and one User should be designated as Team Administrator, assign all of the users to the Standard User Security Role. When the import is finished, you can manually edit the single User who should be a Team Administrator and change their Security Role.

10 Click the **Import Selected** button. Then click the **Close** button in the Invite Confirmation window.



Tip: Desktop Plus Edition will send an automated email to each User with Setup Wizard instructions.

11 Note that the imported Users are listed in the **End User** table for the Organization.



Tip: The **Status** column indicates whether the User has clicked the link in their invitation email to configure their Profile via the Setup Wizard. Once the User Profile is configured, the Status will be *Accepted*. Admins can resend the invitation at any time by selecting the **Reinvite** link.

Inviting Users by Email

Desktop Plus Admins can invite specific users by using the Invite by Email option. This method is especially useful when adding one-off users after an account has been set up. In this section, you will learn how to add new users using the Invite by Email option.

Admin Only: This article outlines functionality available only to Desktop Plus Admins. Standard Users should advance to the next article in this User Guide.

Warning: We highly recommend that you do not invite any users to the account until your question decks and answers are complete as part of the initial implementation for your account. Once users have access to Meeting Recap, they will be able to configure their own Profiles, download the mobile application, and begin to submit Meeting Recaps. Inviting users prior to finalizing the question decks can cause confusion and result in inaccurate or inconsistent data capture.

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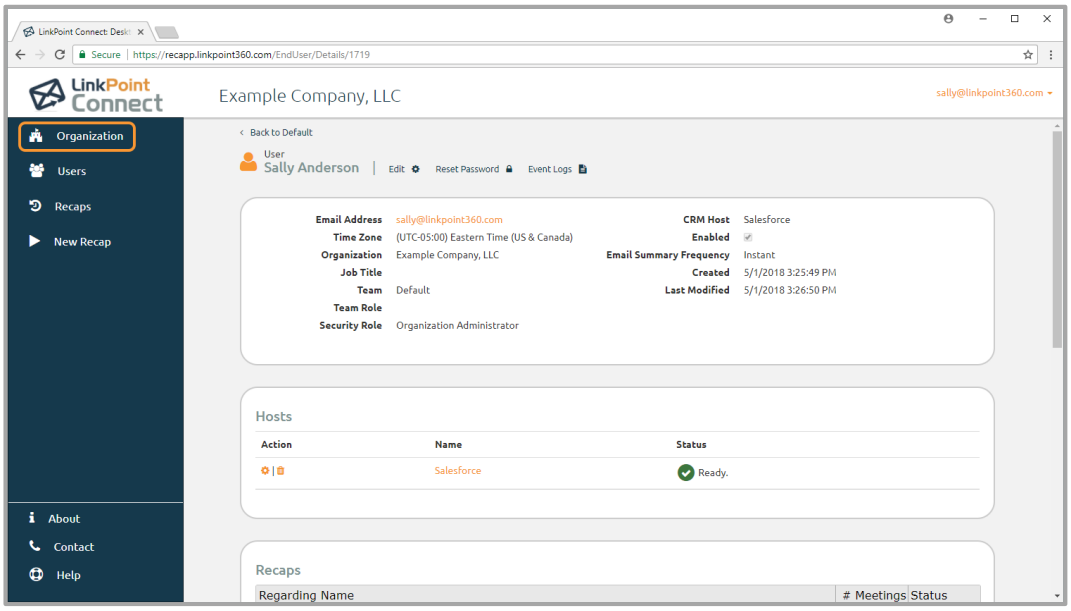
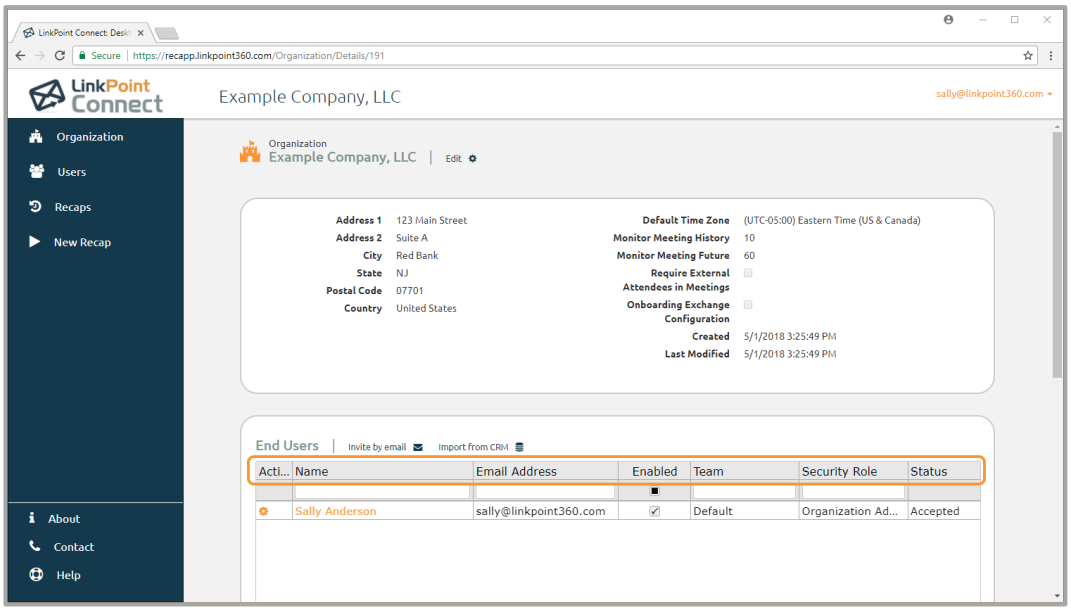
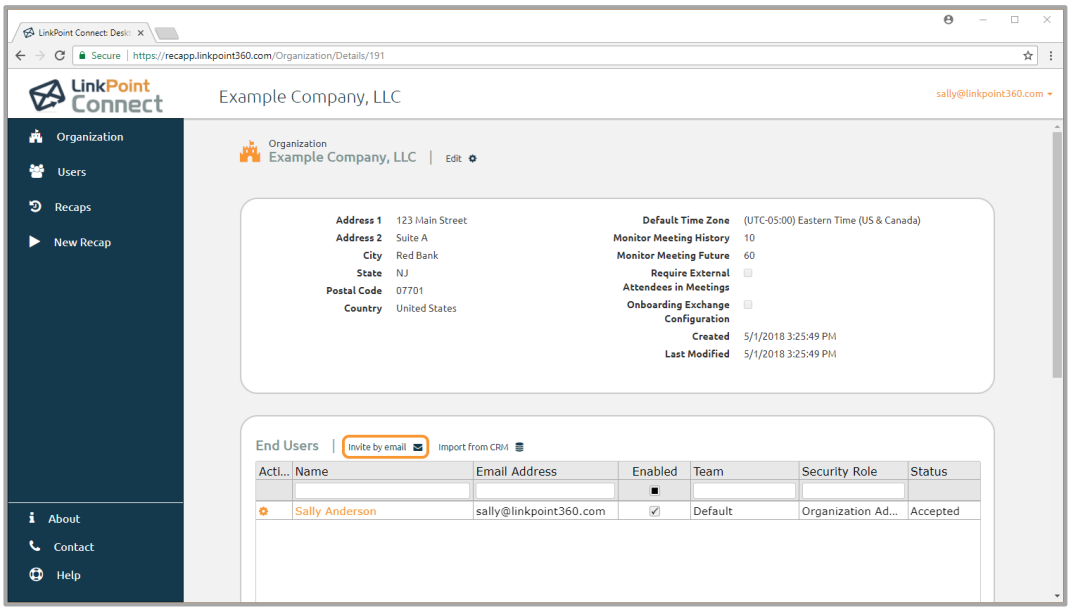


2 Locate the **End Users** section and note the available data columns. You can click on the column headers to sort the data by either Name, Email Address, Enabled, Team, Security Role, or Status.

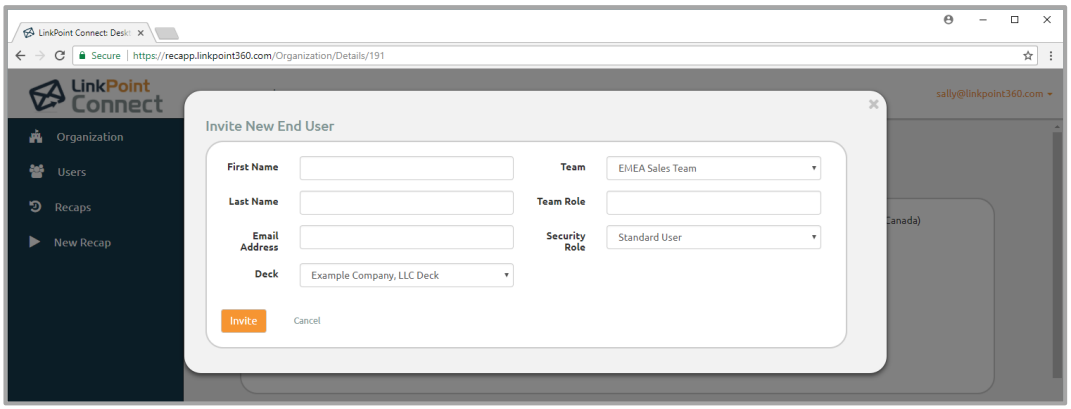


Tip: For first-time access and setup, the only User listed will be the Organization Administrator.

3 Select the **Invite by email** option.



4 Enter the information into the corresponding fields in the **Invite New End User** window for **First Name**, **Last Name**, **Email Address**, **Deck**, **Team**, **Team Role**, and **Security Role**.

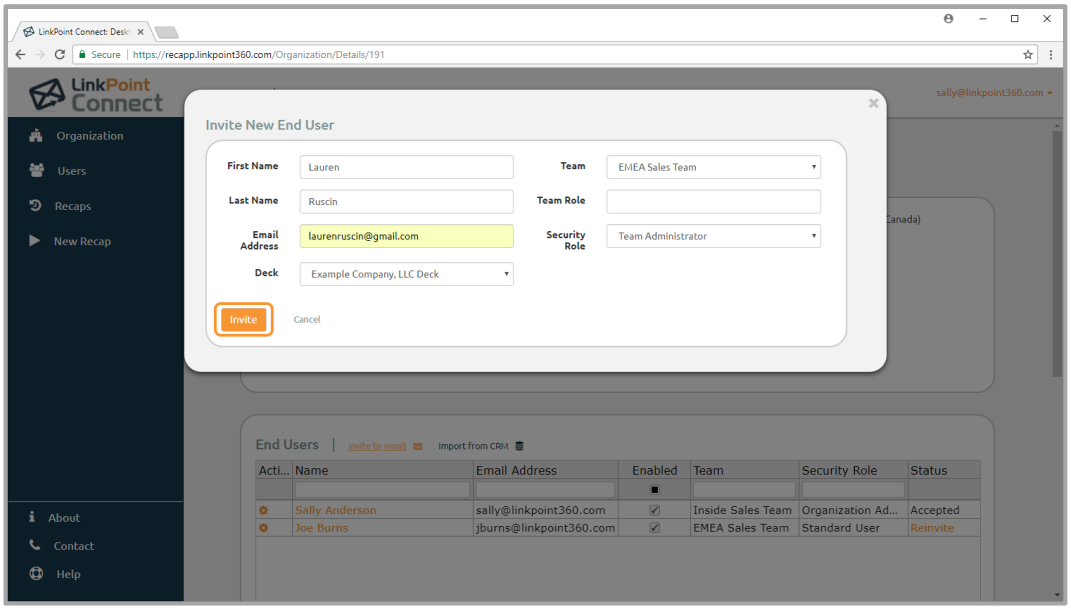


Tip: Decks are sets of questions and answers used with Meeting Recap. These are configured during the implementation process. Depending on your configuration, you have may have multiple Deck options.

Tip: The same Team Role may not apply to all of the users on a specific Team. You can leave the Team Role blank for the import process and manually assign each Team Role to the users as applicable. Alternatively, you can import a smaller batch of users so that only users who should be on the same Team *and* the same Team Role are selected.

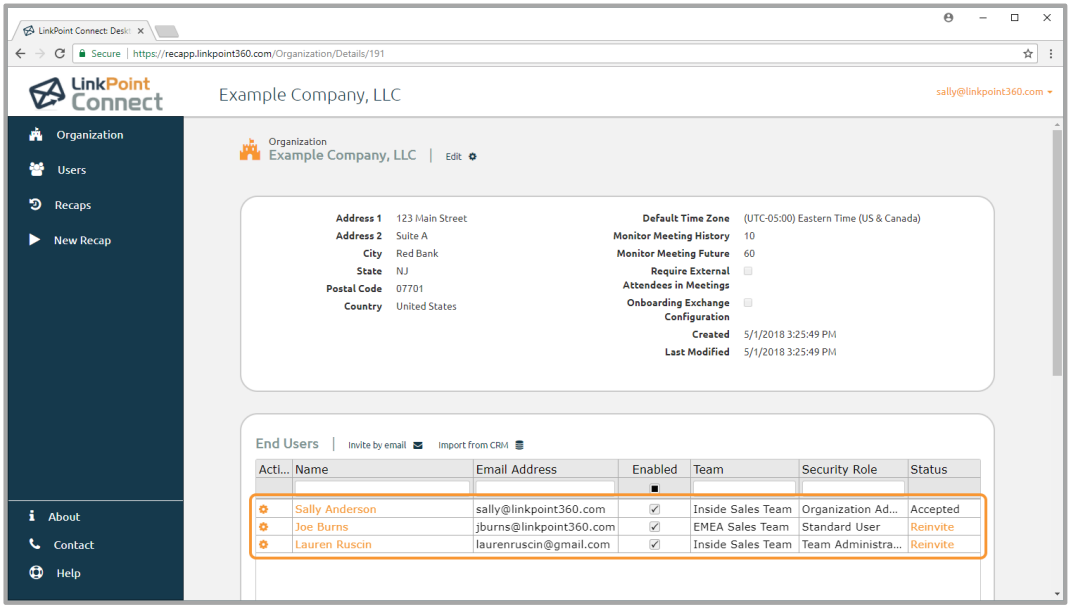
Additional Resources: Refer to the **Reviewing Organization Options** section of this User Guide for more information.

5 Click the **Invite** button when you are finished. Then click the **Close** button in the Invite Confirmation window.



Tip: Desktop Plus Edition will send an automated email to each User with Setup Wizard instructions.

6 Note that the imported Users are listed in the **End User** table for the Organization.



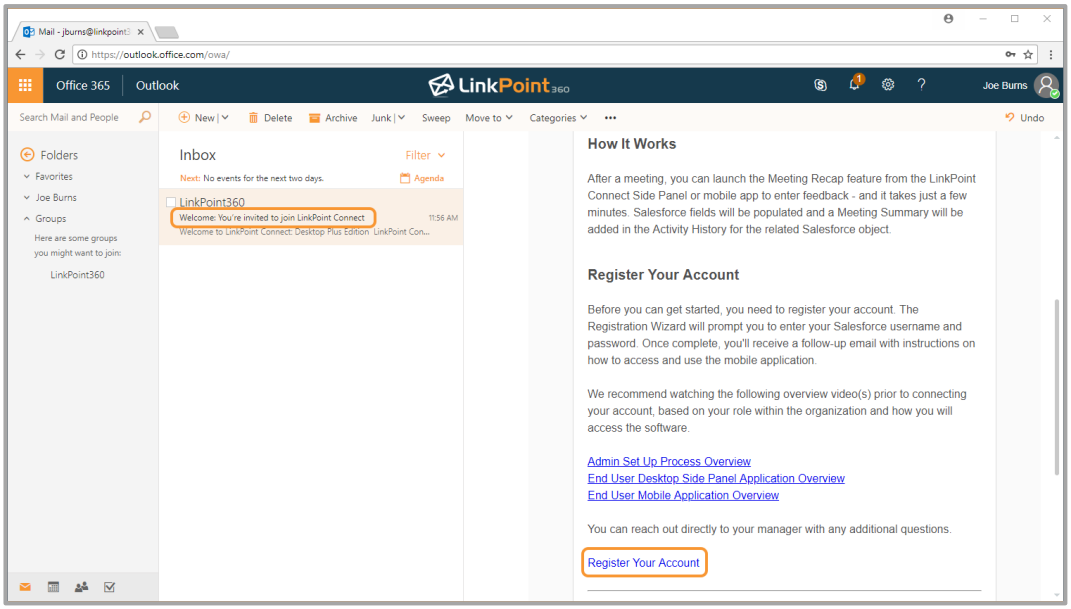
Tip: The **Status** column indicates whether the User has clicked the link in their invitation email to configure their Profile via the Setup Wizard. Once the User Profile is configured, the Status will be *Accepted*. Admins can resend the invitation at any time by selecting the **Reinvite** link.

Completing the Setup Wizard

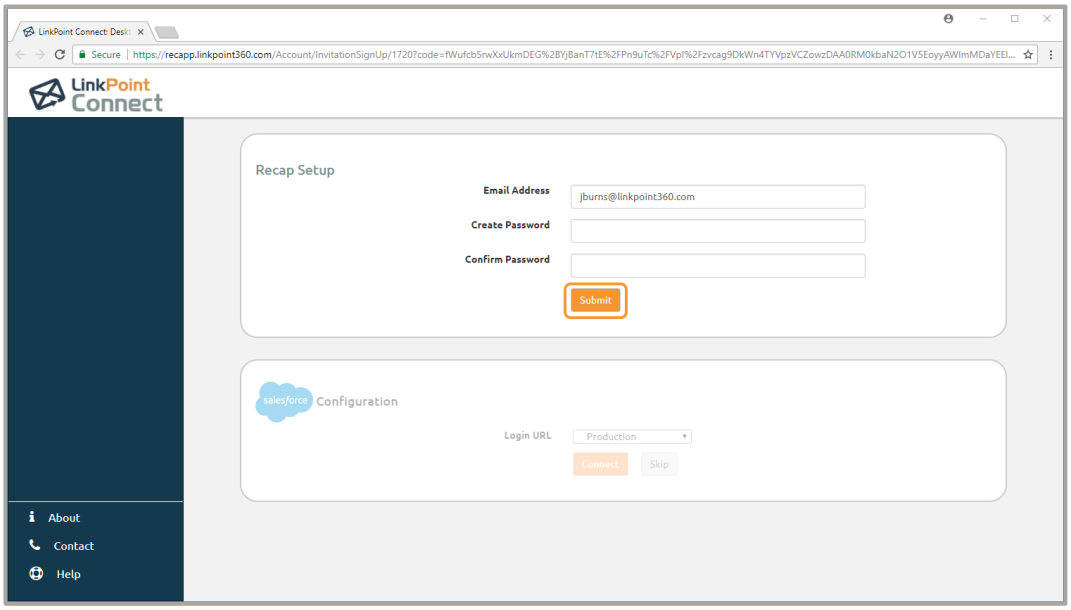
All users must log into the LinkPoint Connect: Desktop Plus Web Portal and complete the Setup Wizard. The Setup Wizard is designed to walk each user through the configuration process. In this section, you will learn how to complete the Setup Wizard.

Warning: Before you can use the Meeting Recap Side Panel icon or mobile app, you must complete the Setup Wizard. The Setup Wizard includes a step to connect to Salesforce which is required to sync a Meeting Recap.

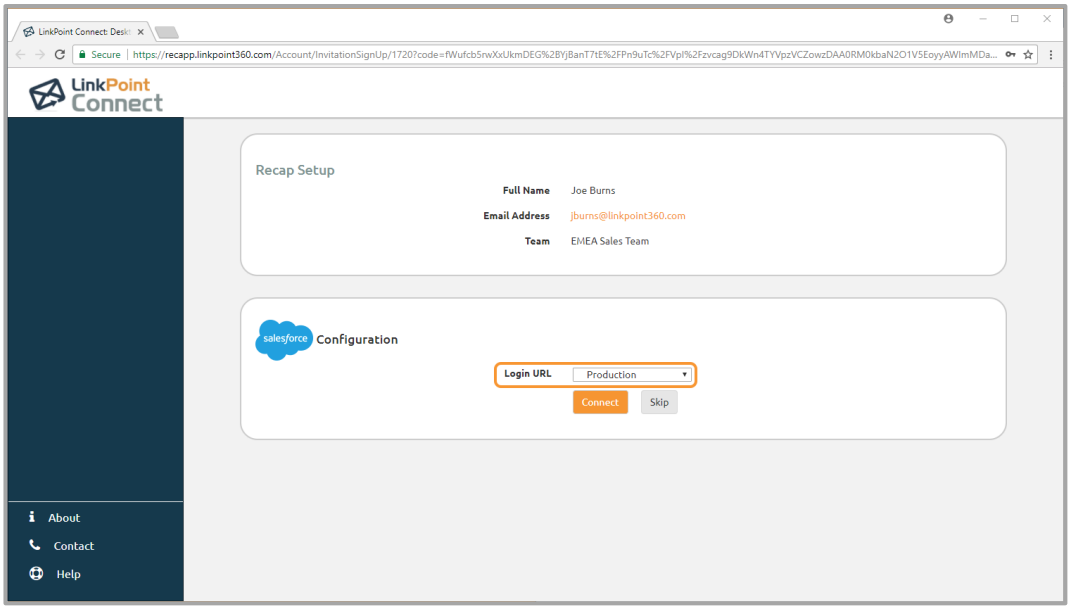
1. Check your email and locate the message with the Subject Line **Welcome: You're invited to join LinkPoint Connect**. Select the link **Register Your Account** link in the email.



2 Enter a password for the Desktop Plus Edition account in the **Create Password** and **Confirm Password** fields for the Setup Wizard, and click **Submit**.



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

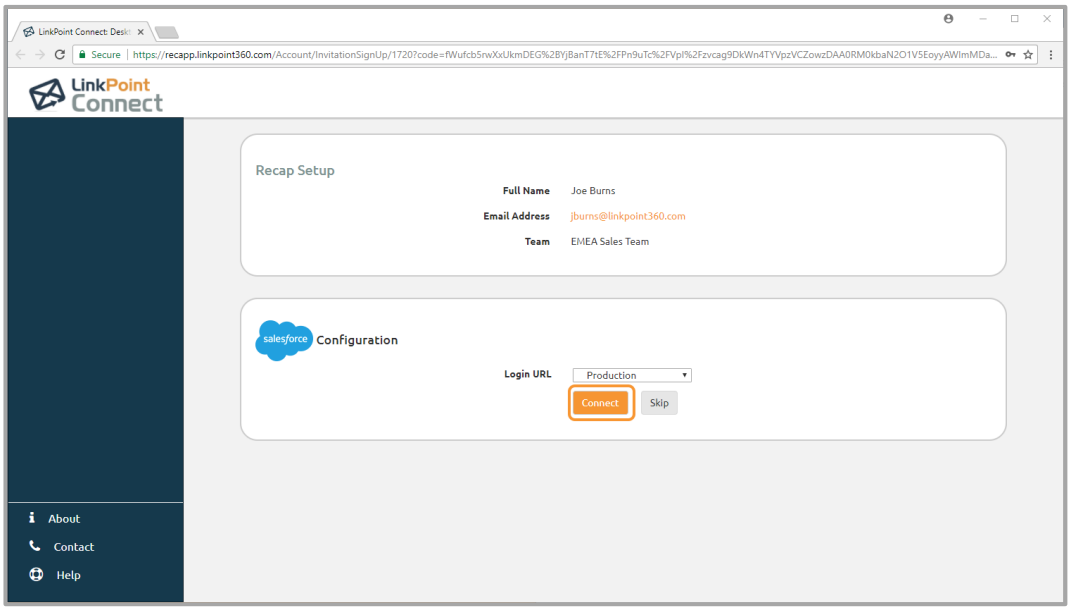


Tip: The default setting is *Production*. You will want to use this option unless:

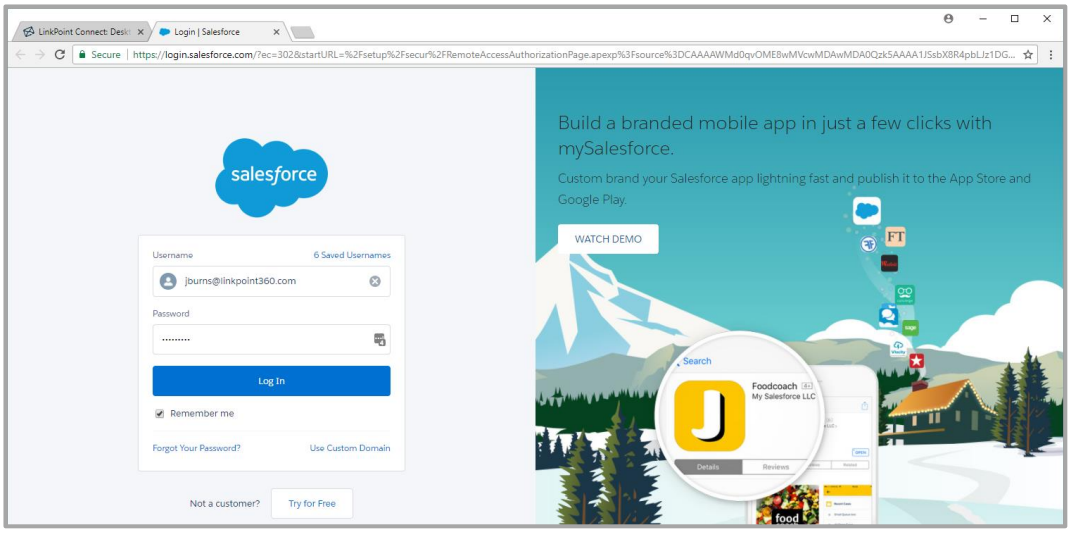
- You are testing with a Salesforce Sandbox or Test account. In this case, select *Sandbox*.
- You are using a custom URL to access Salesforce as defined by your organization. In this case, select *Custom* and enter the URL details.

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

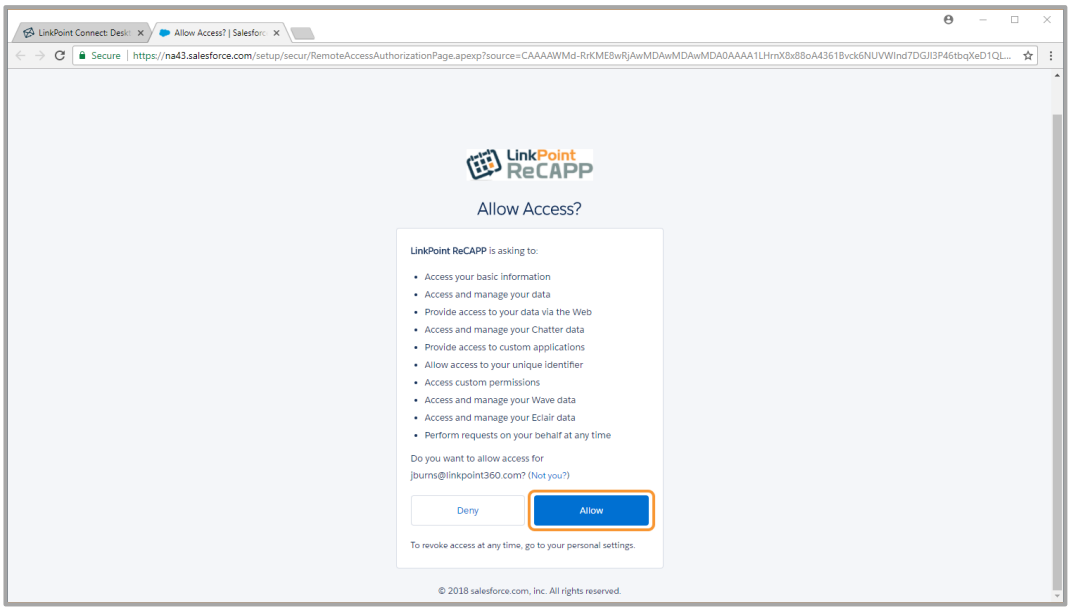
4 Click **Connect**.



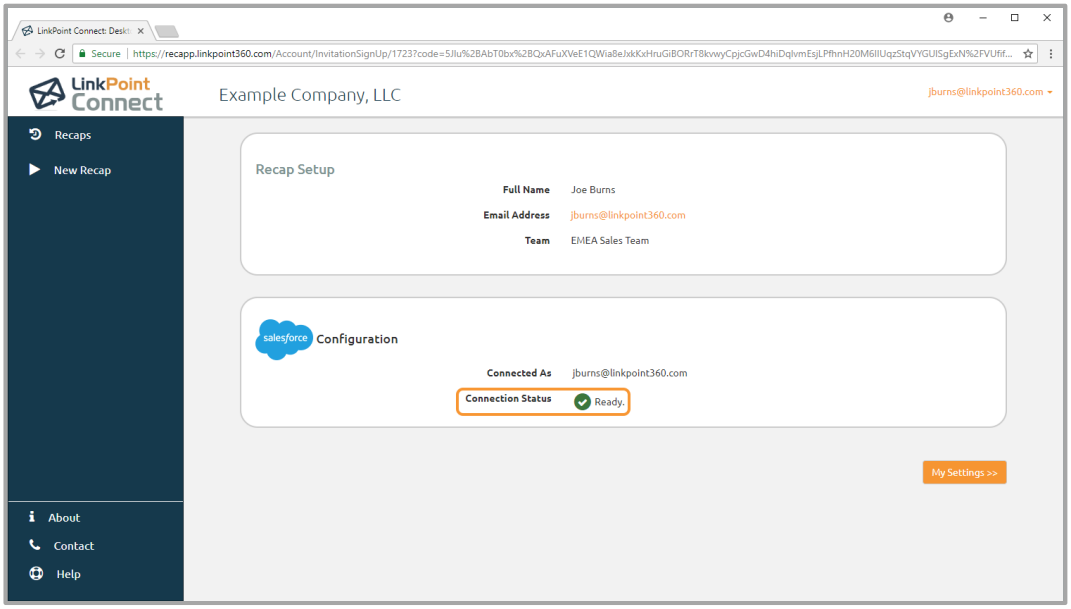
5 Enter your Salesforce credentials. This may automatically process if you are already logged into Salesforce.



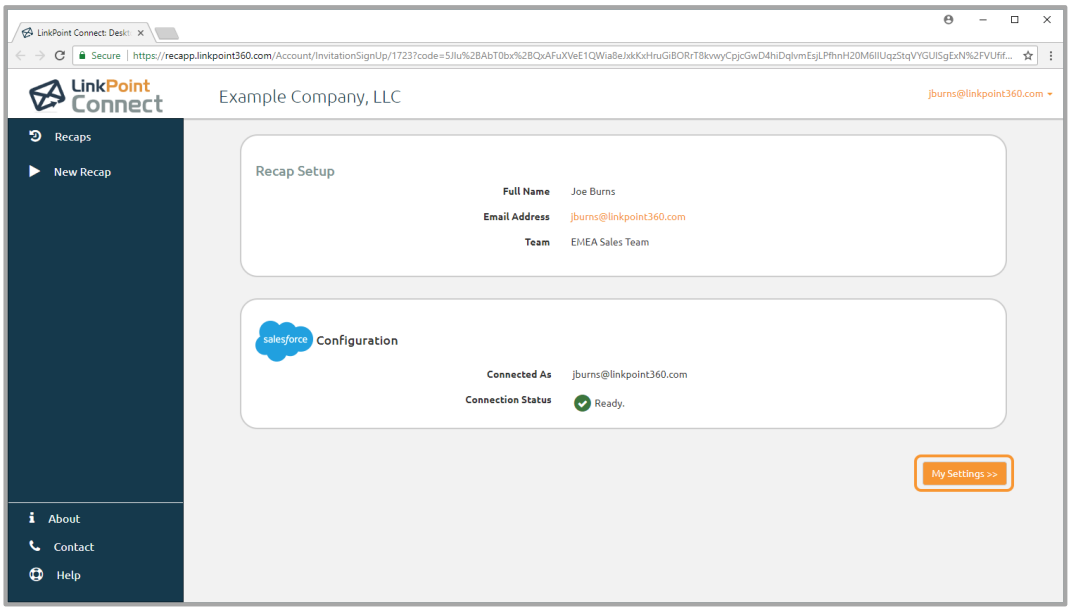
6 Click **Allow** to permit the application to access your Salesforce account.



7 A **Connection Status** of *Ready* is displayed once the Salesforce account is connected. If the status is *Not Ready*, repeat the process to connect the Salesforce account.



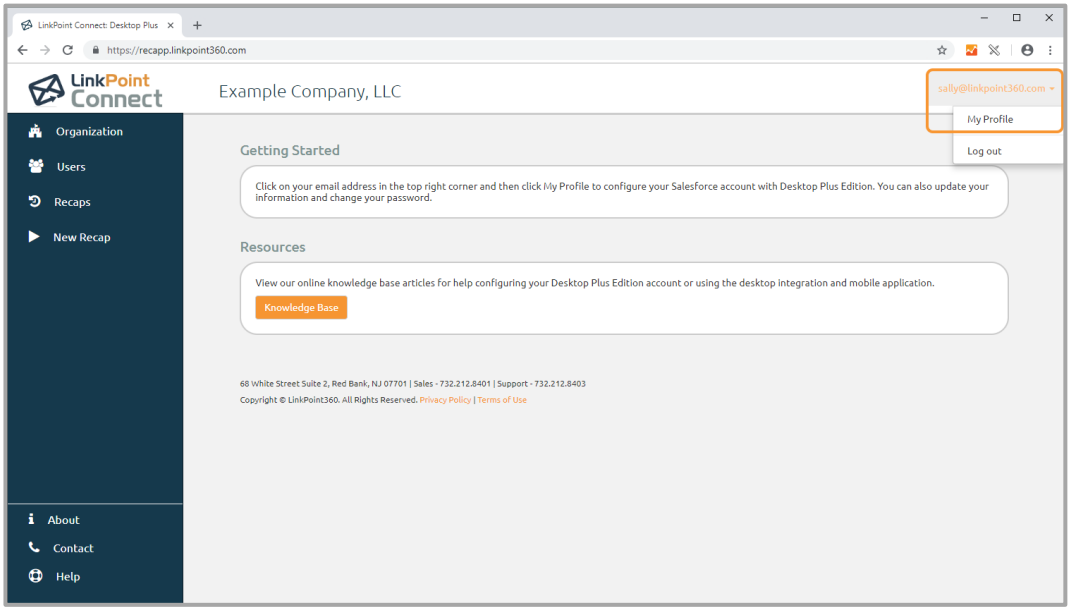
8 Click the **My Settings** button to proceed to the Profile configuration.



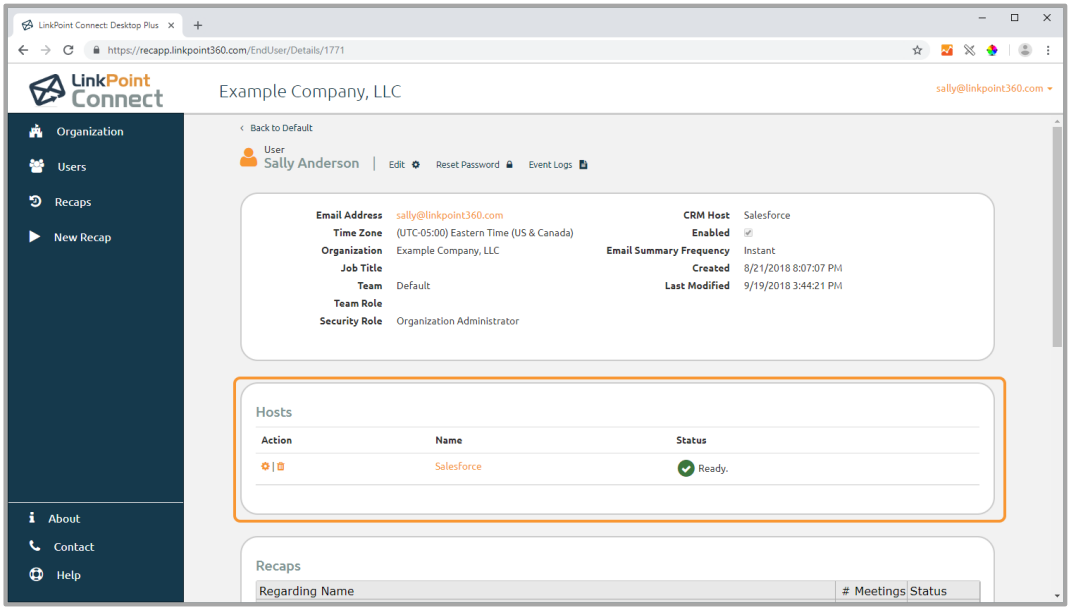
Connecting to Salesforce

Users can review their connection to Salesforce in order to disconnect or make changes to their integration configuration. In this section, you will learn how to update your Salesforce account for LinkPoint Connect: Desktop Plus Edition.

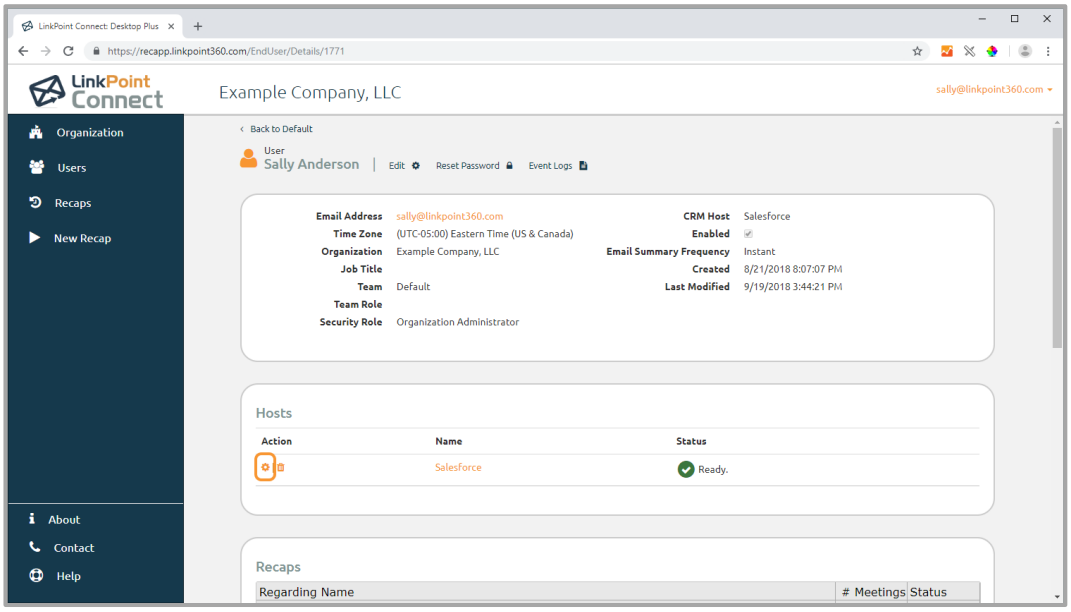
1 Log in to Desktop Plus, and click the email address in the top right corner. Then click **My Profile**.



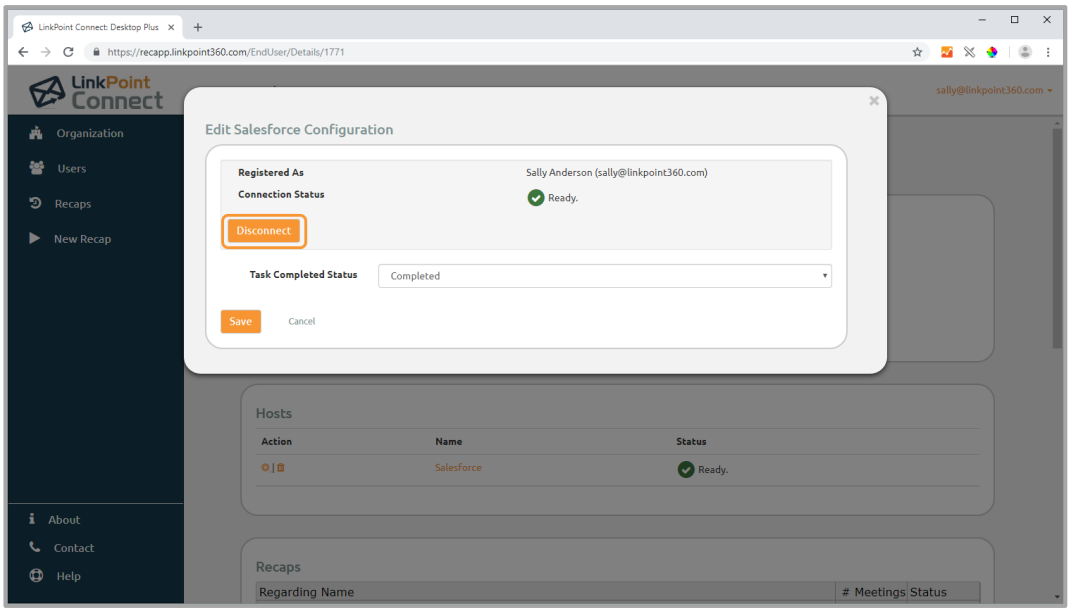
2 Locate the **Hosts** section and note the Salesforce connection status. The **red X** and **Please configure.** status indicate that the user account is not connected to Salesforce. The **green ✓** and **Ready** status indicate that the user account is connected to Salesforce.



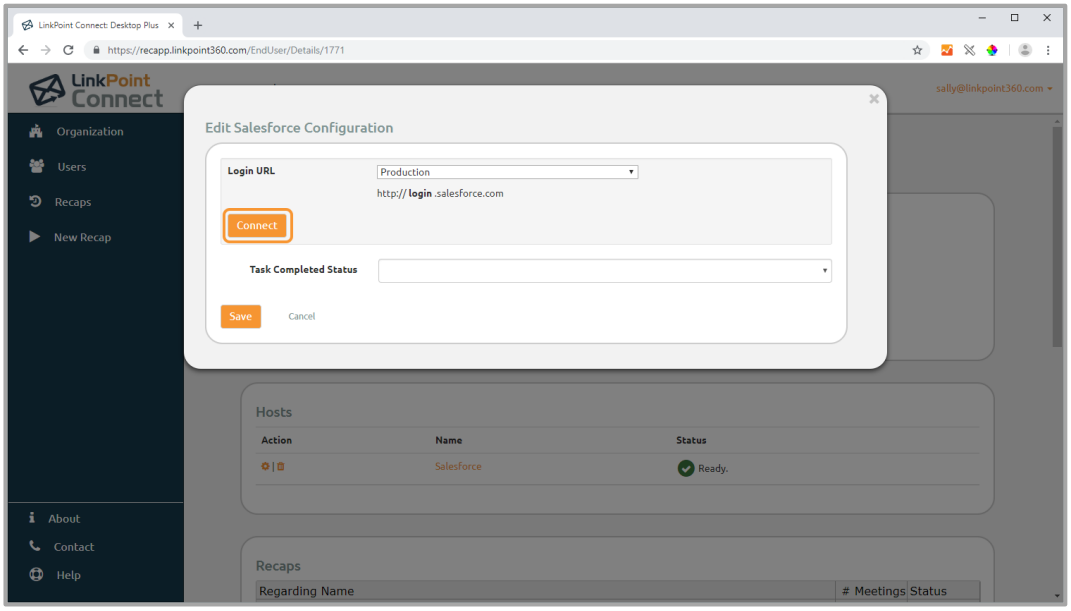
3 Select the **Edit** icon for the **Salesforce Host** to view the Salesforce connection options.



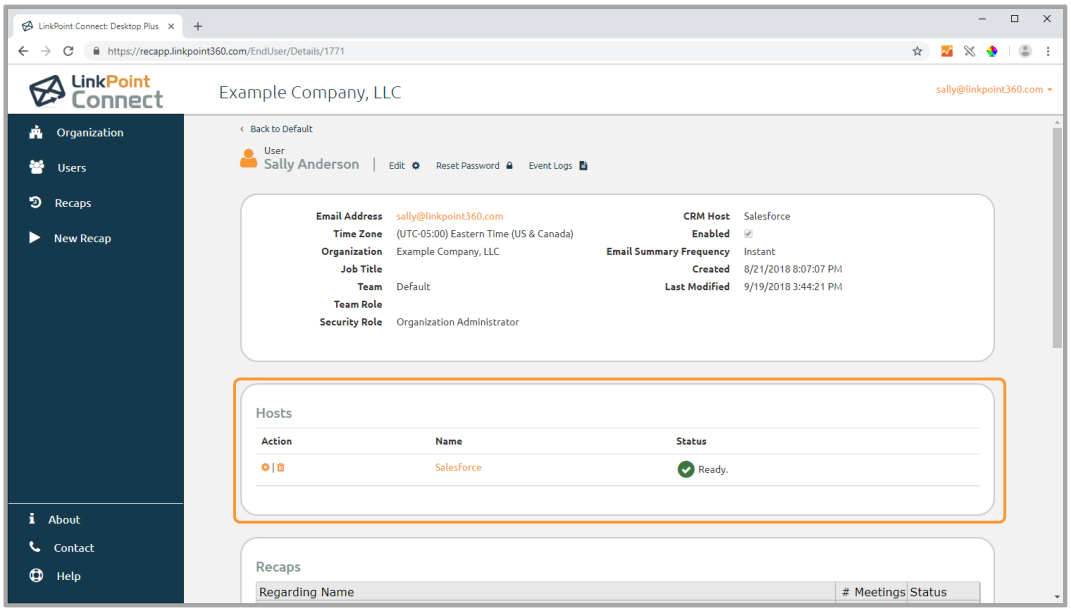
4 Click the **Disconnect** button to remove the connection between Desktop Plus and Salesforce.



5 Click the **Connect** button to connect to the new Salesforce account. If you are already logged into Salesforce, Desktop Plus will establish the connection and close the window.



6 Note that the Salesforce account is now connected to Desktop Plus with the **green** ✓ and **Ready** message displayed.

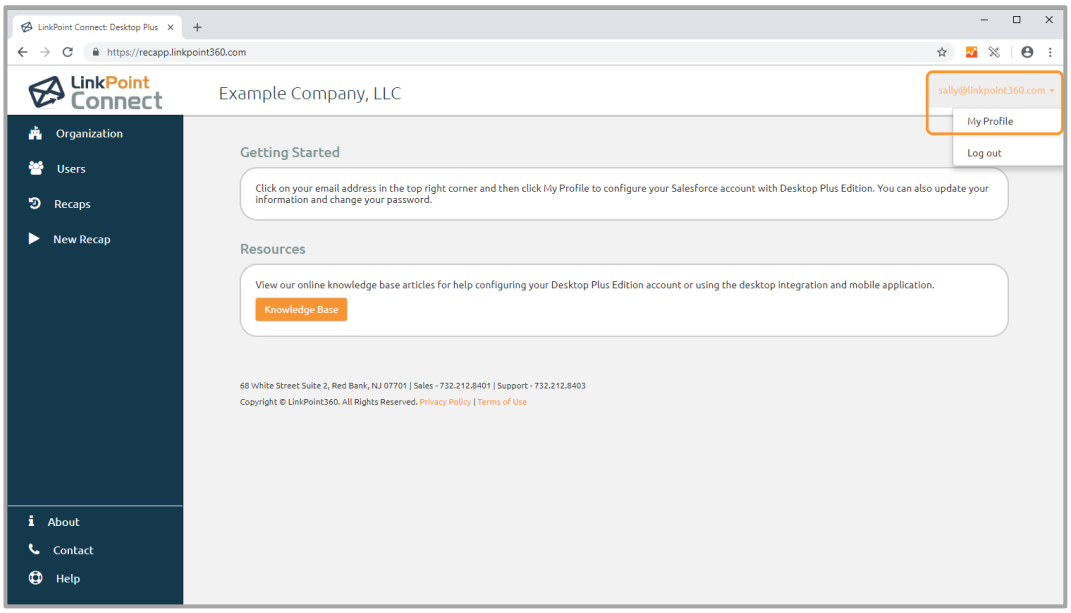


Connecting to Microsoft Exchange

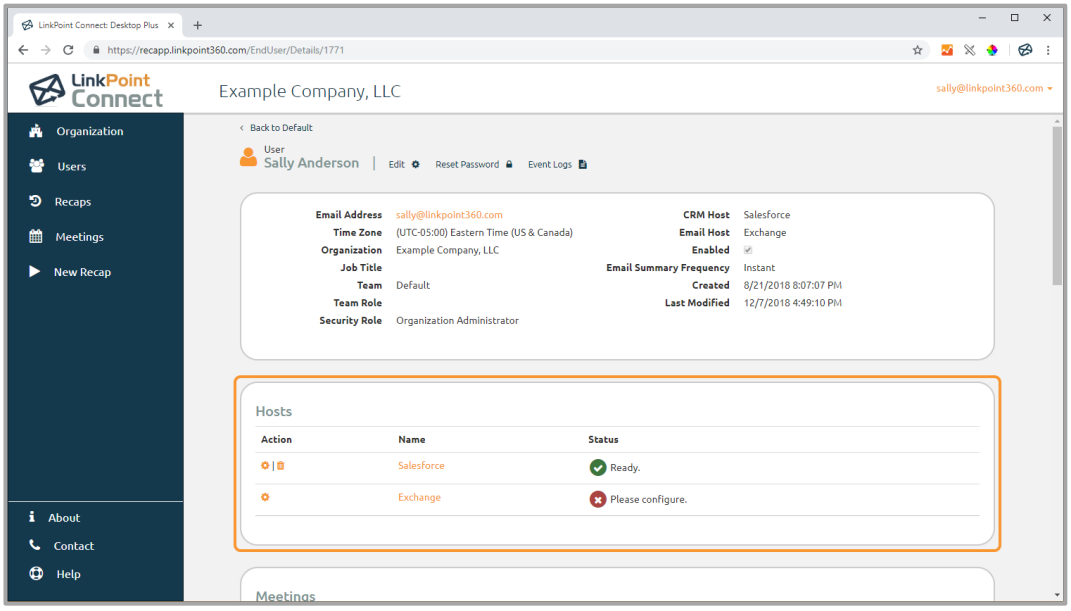
Users can review their connection to Microsoft Exchange in order to disconnect or make changes to their integration configuration. In this section, you will learn how to update your Microsoft Exchange account to LinkPoint Connect: Desktop Plus Edition.

Tip: Integration with Microsoft Exchange is off by default for all new accounts and must be requested as part of the implementation process. Adding this level of integration allows Meeting Recap access to the Appointments listed on a user's calendar in order to prompt real-time reminders to submit a Meeting Recap at the close of a meeting.

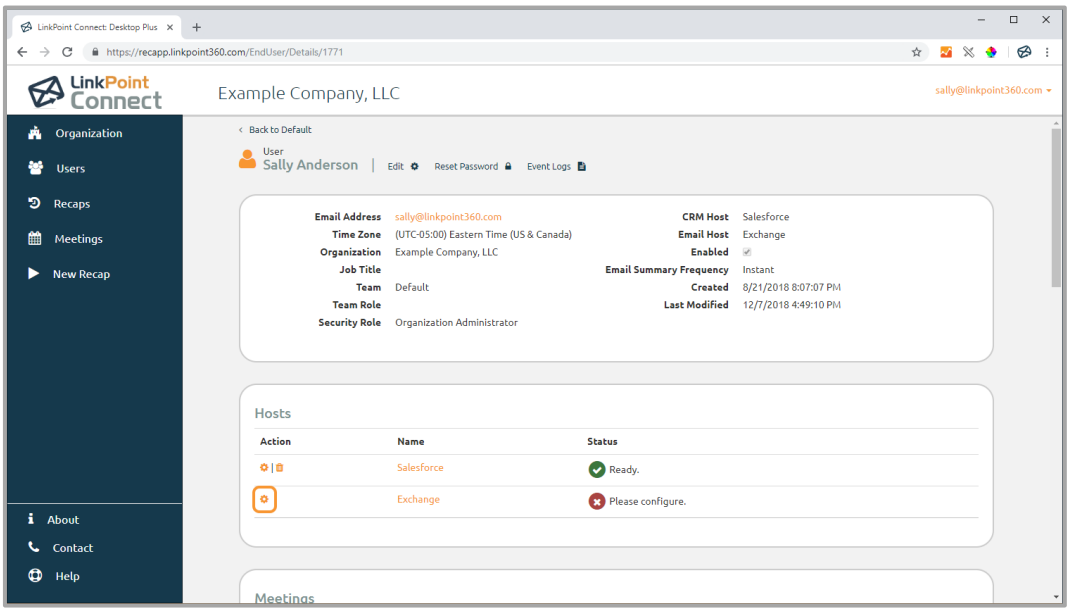
1. Log in to Desktop Plus, and click the email address in the top right corner. Then click **My Profile**.



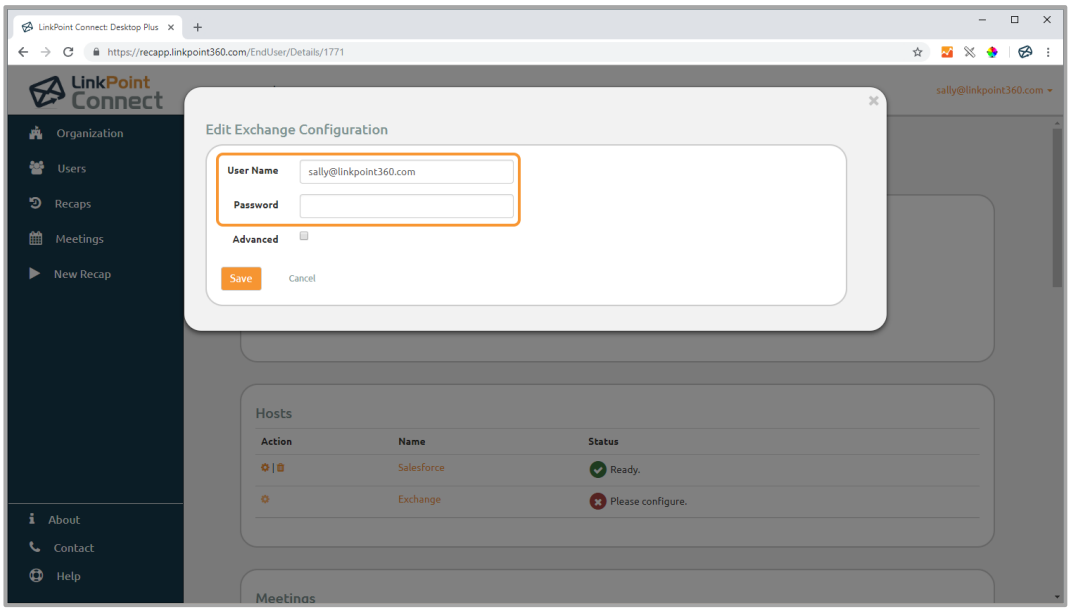
2 Locate the **Hosts** section and note the Exchange connection status. The **red X** and **Please configure.** status indicate that the user account is not connected to Exchange. The **green ✓** and **Ready** status indicate that the user account is connected to Exchange.



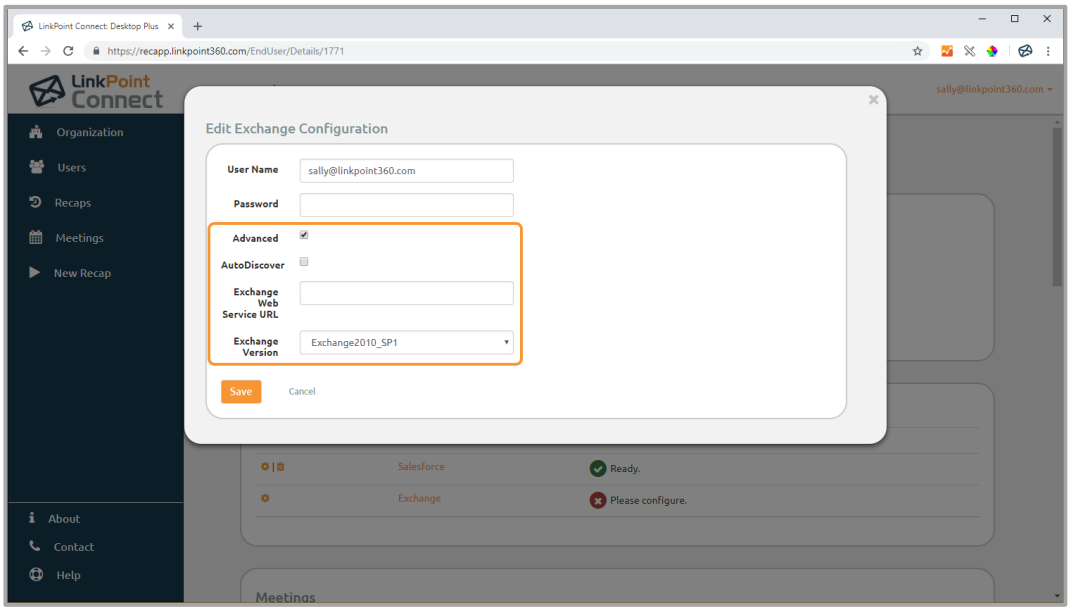
3 Select the **Edit** icon for the **Exchange Host** to view the Exchange connection options.



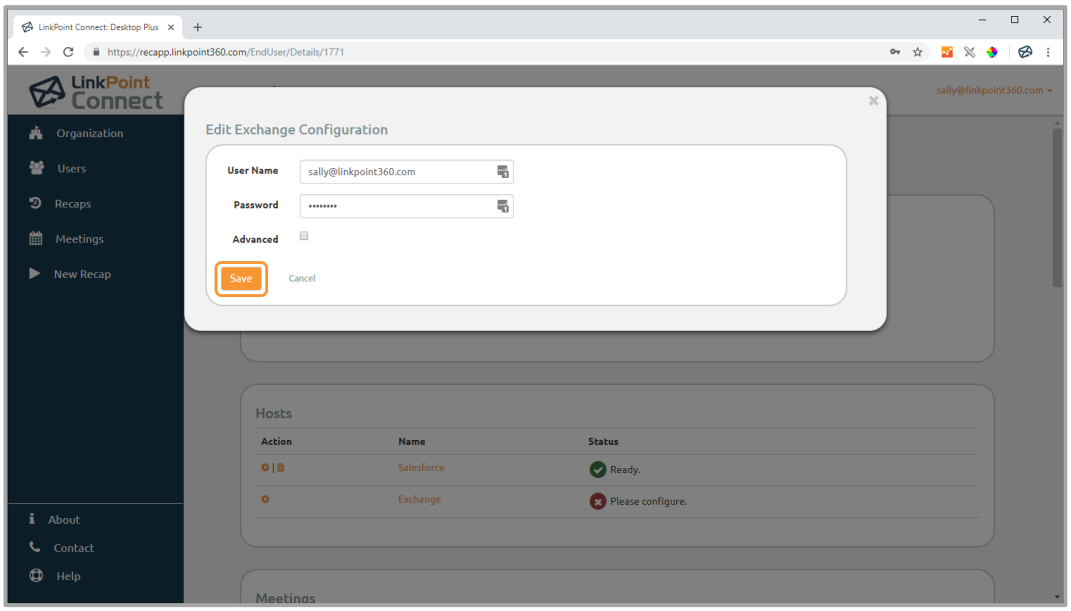
4 Enter the **User Name** and **Password** associated with the Exchange account.



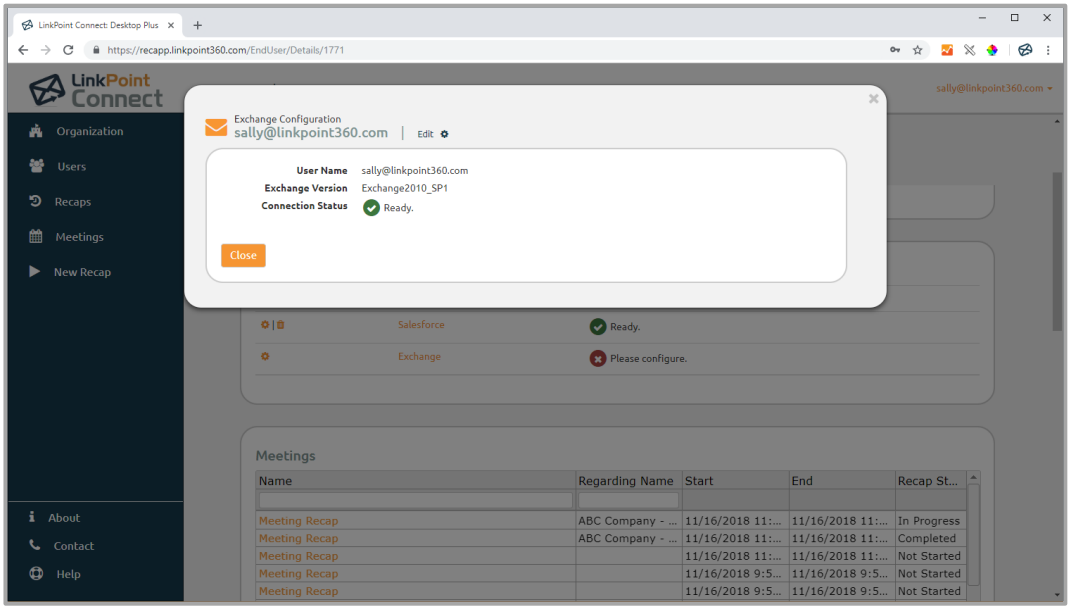
Tip: Some organizations configure their Exchange environments to block autodiscover connections. To troubleshoot, select the Advanced checkbox and deselect the option to Use Exchange Autodiscover Service? Enter the Exchange Web Service URL and Exchange Version for your environment. This should be provided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



5 Click **Save** when all of the information has been entered.



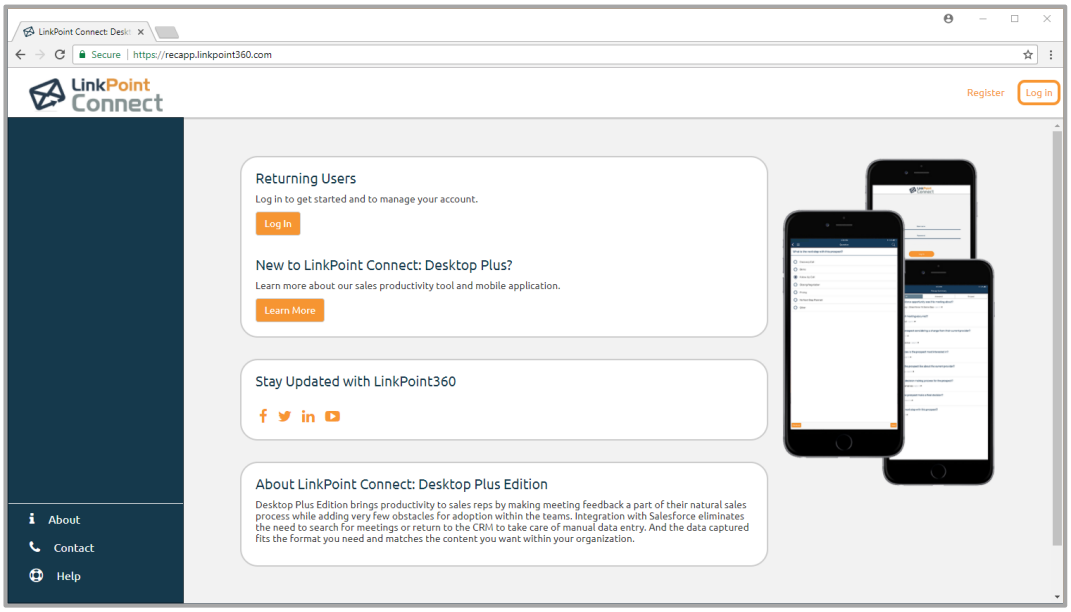
6 Note that the Exchange account is now connected, and click the **Close** button.



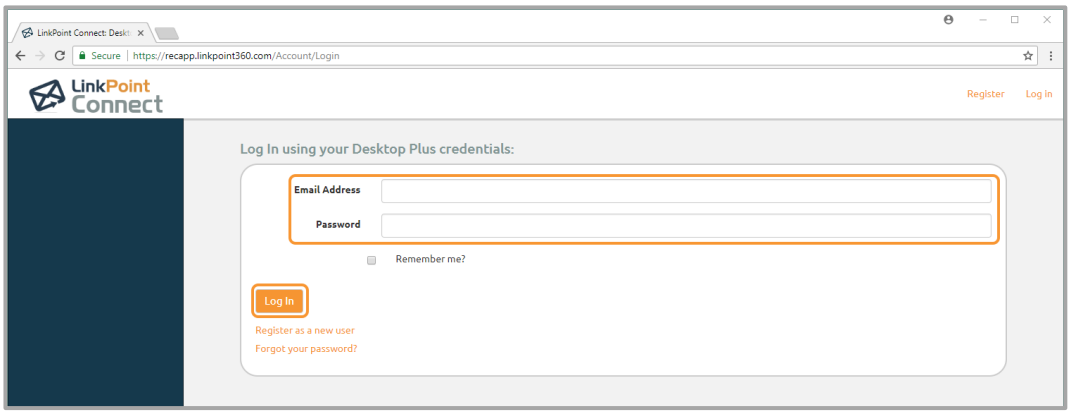
Logging In and Out of the Web Portal

Desktop Plus Edition settings can be accessed easily via any web browser. The level of access varies for Admin and Standard Users. In this section, you will learn how to log in to and out of the Desktop Plus web portal.

1 Visit https://recapp.linkpoint360.com. Select the **Log in** link in the top right corner of the screen.

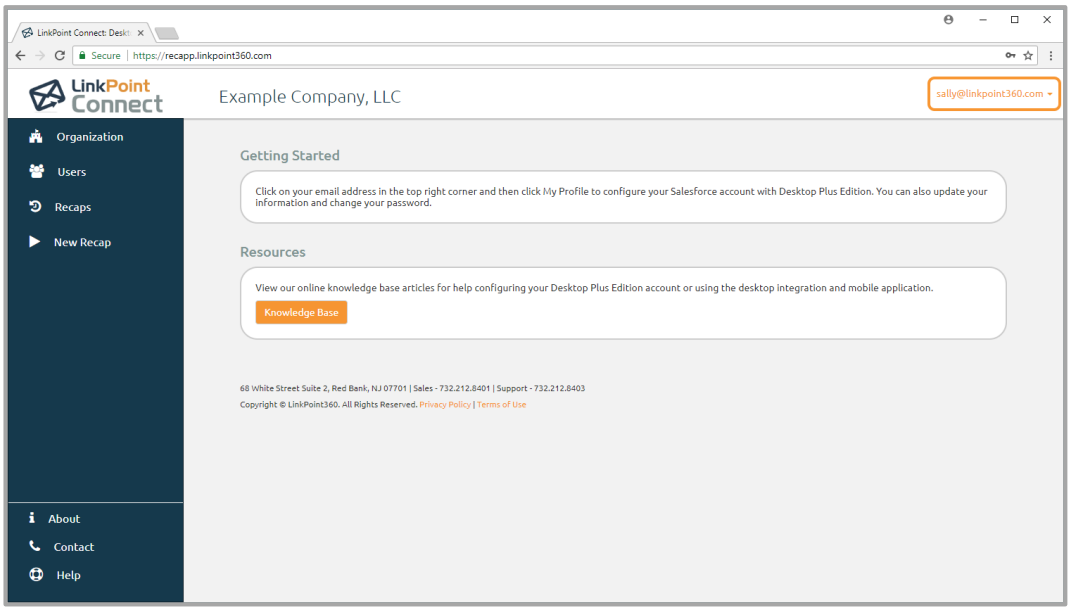


2 Enter your **Email Address** and **Password**, then click the **Log in** button.

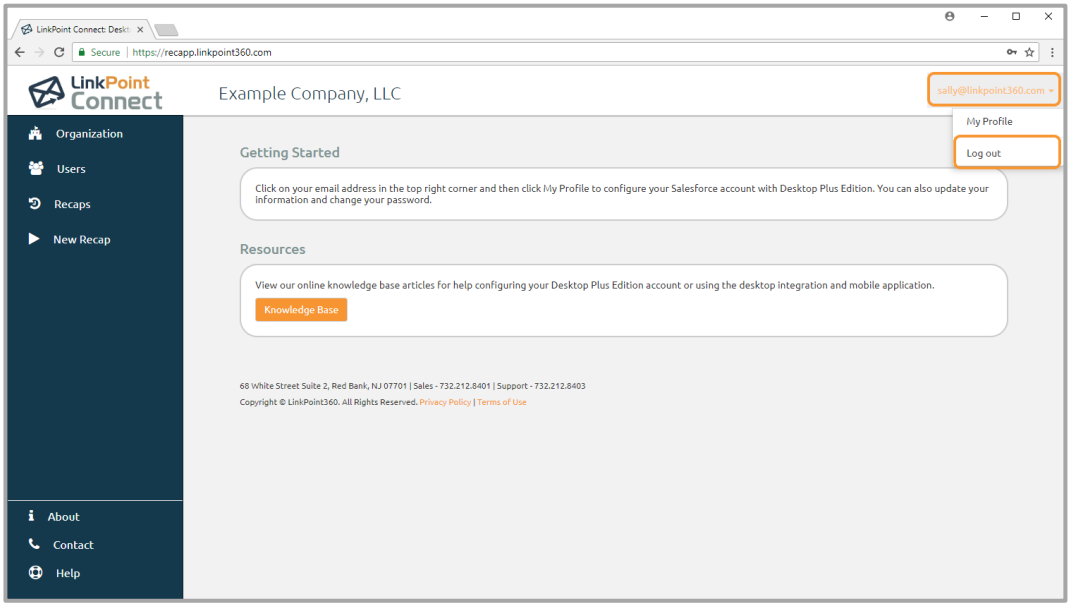


Tip: For first-time access by an Admin, the LinkPoint360 Professional Services Team will provide you with a password. You will be able to change your password later in the process.

3 View the **Getting Started** screen. Note that the email address listed in the top right of the screen indicates that you are actively logged into Desktop Plus Edition.



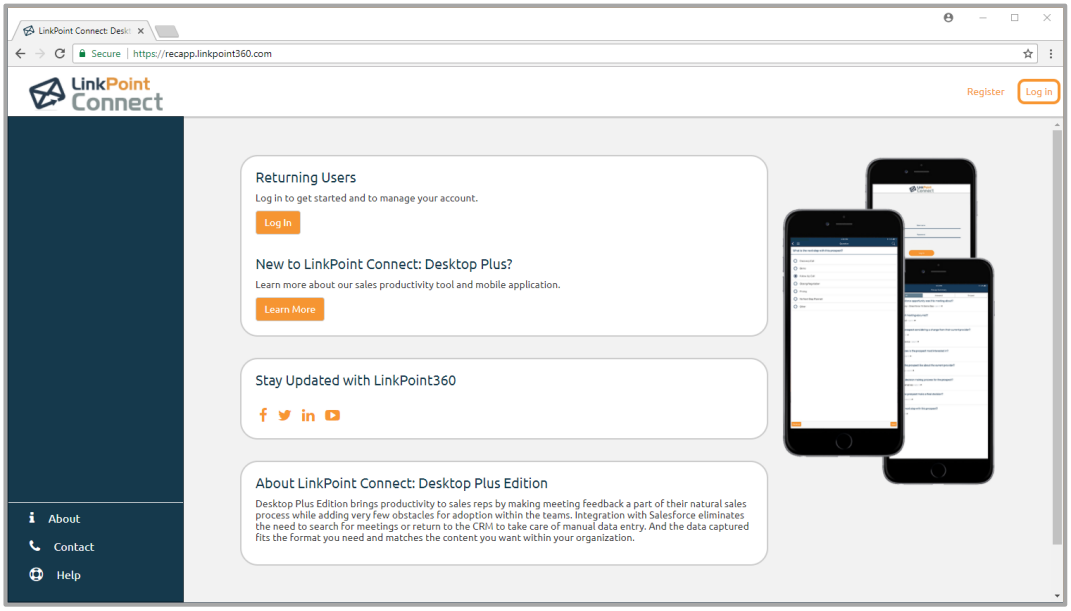
4 When you are finished, click the email address in the top right of the screen and then click **Log out** to securely close Desktop Plus Edition and end your session.



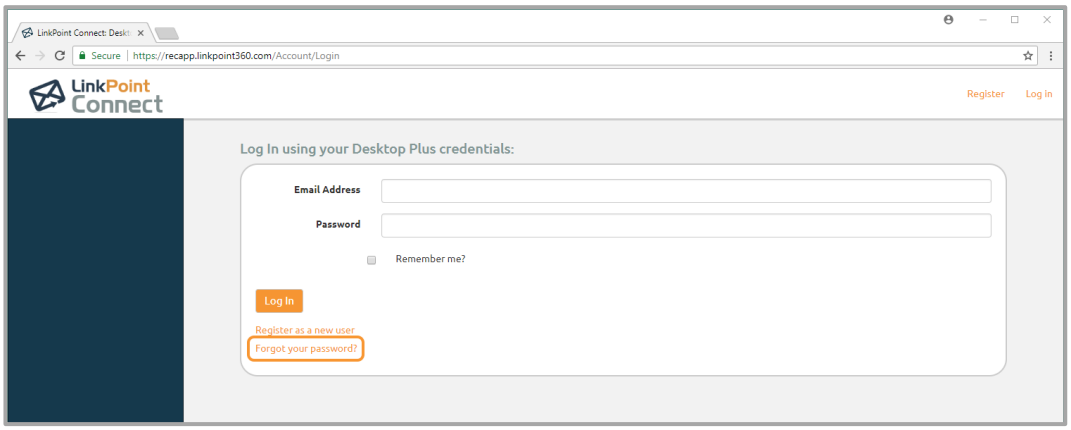
Resetting a Forgotten Password

Desktop Plus Edition settings can be accessed easily via any web browser. Admins and Standard Users can update or resend their log in details via the Desktop Plus web portal. In this section, you will learn how to reset a forgotten password.

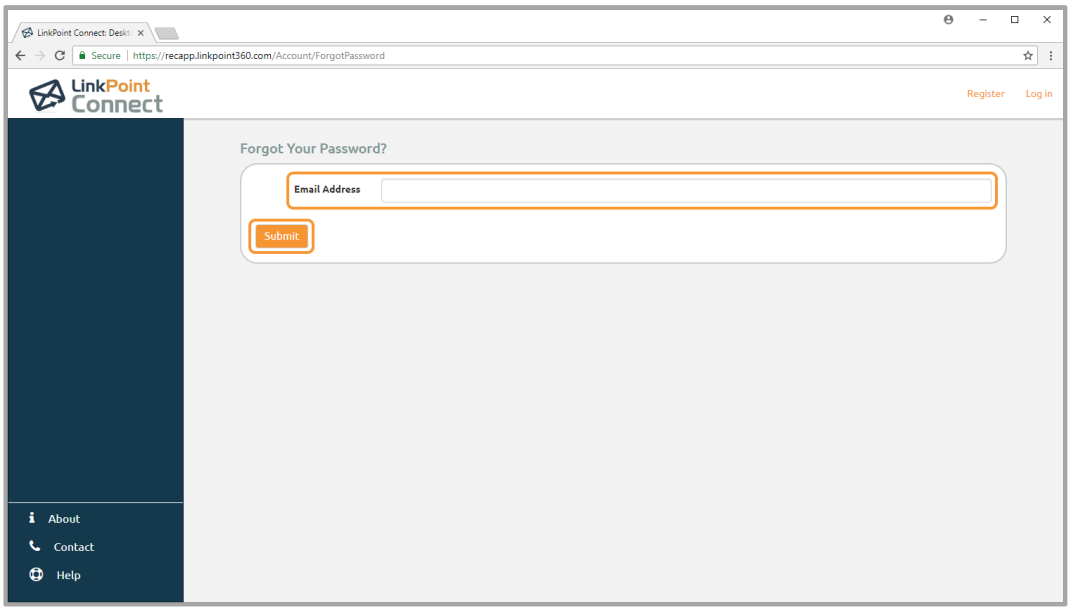
1 Visit https://recapp.linkpoint360.com. Select the **Log in** link in the top right corner of the screen.



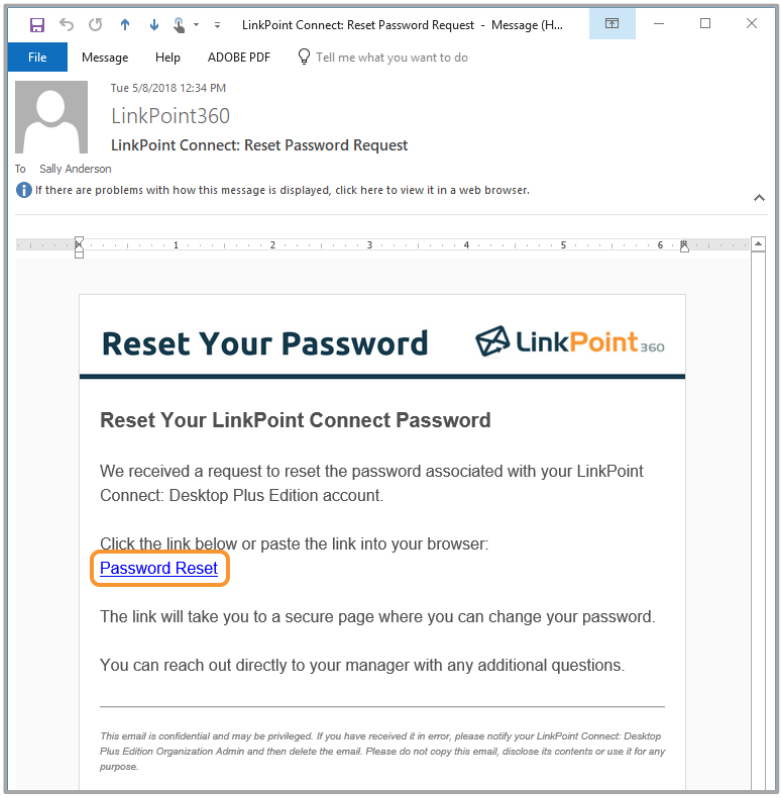
2 Select the **Forgot your password?** link.



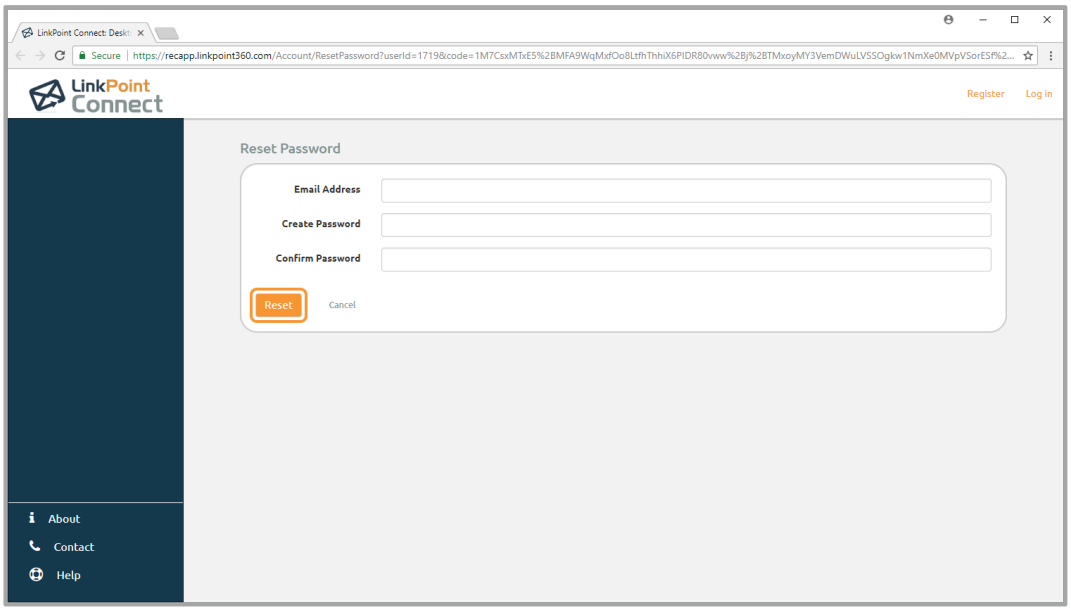
3 Enter your **Email Address**, and click the **Submit** button.



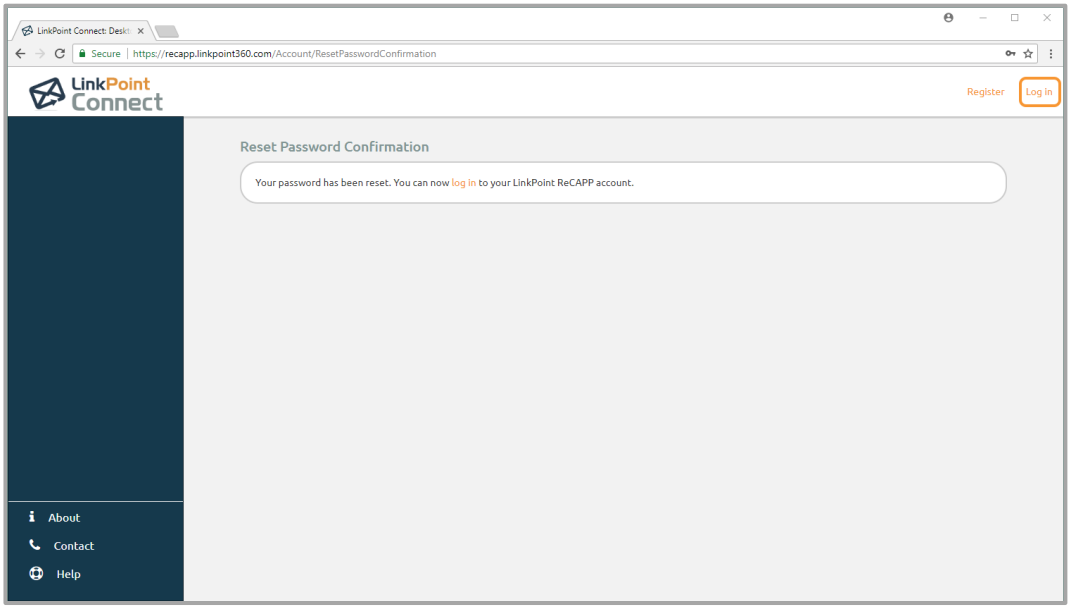
4 Check your email for a message with the Subject Line **LinkPoint Connect: Reset Password Request**, and select the **Password Reset** link.



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



6 Log in to Desktop Plus Edition using the new password.

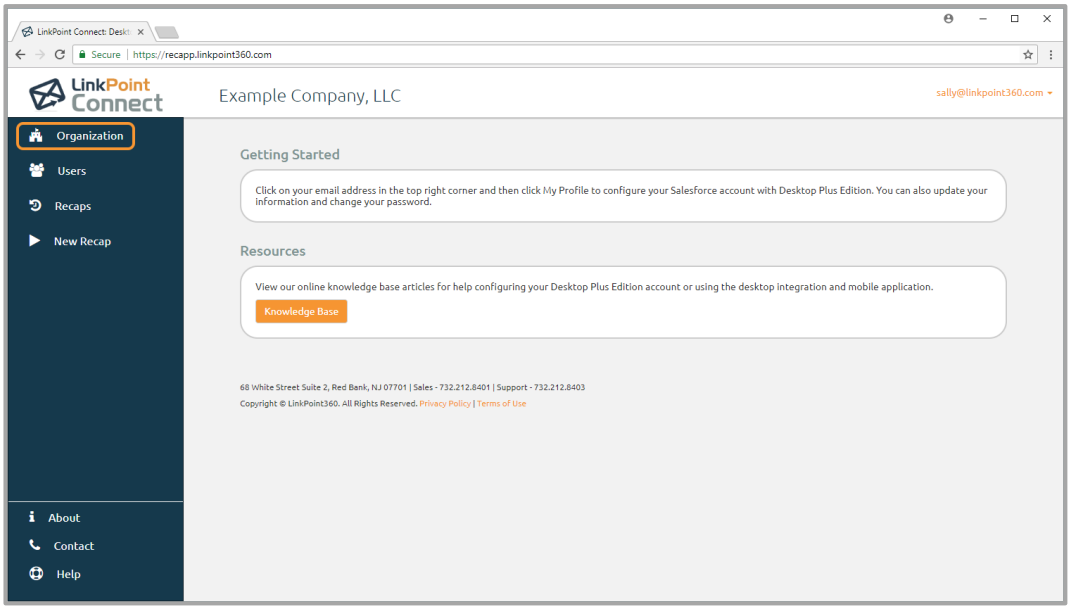


Reviewing Organization Options

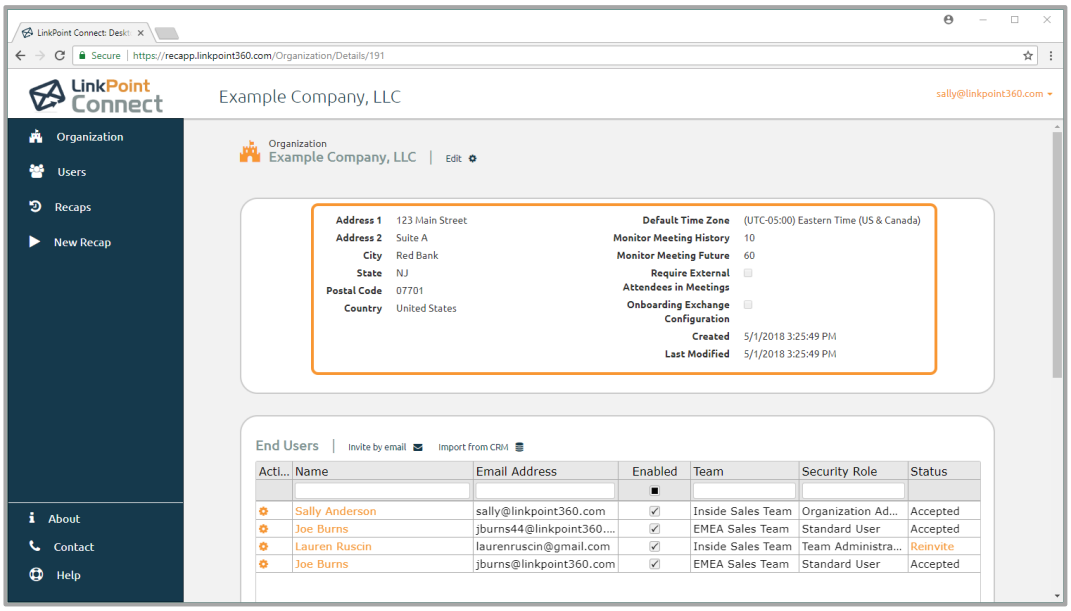
An Organization is the overall account level within Desktop Plus Edition. Admins will always have access to a single Organization for their company. In this section, you will become familiar with the available options on the Organization level.

Admin Only: This article outlines functionality available only to Desktop Plus Admins. Standard Users should advance to the next article in this User Guide.

1 Log into Desktop Plus Edition and select **Organization** in the left navigation.

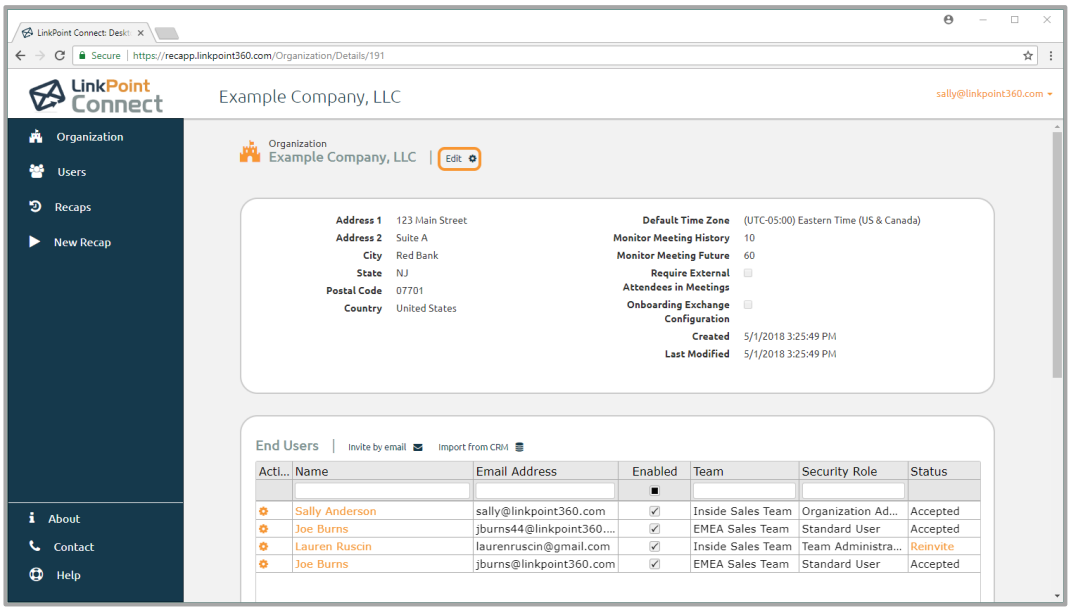


2 Review the available **Organization** details.

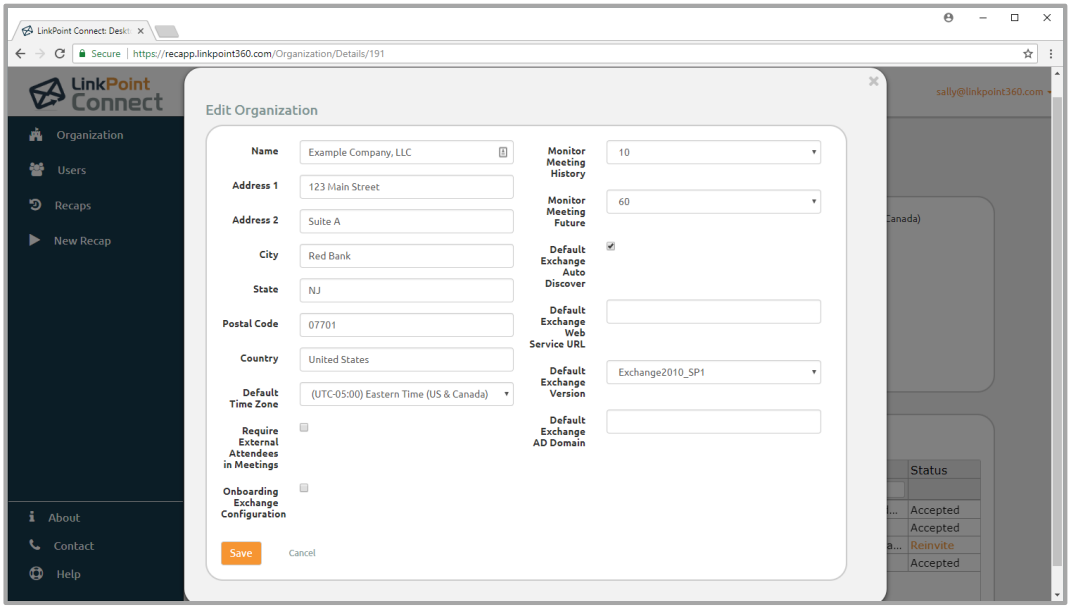


- **Address Fields:** The information used for billing and mailing purposes. Includes *Address 1*, *Address 2*, *City*, *State*, *Postal Code*, and *Country*.
- **Time Zone:** The time zone selected for the Desktop Plus Edition account.
- **Monitor Meeting History:** Establishes the lower limit of the date range for the Exchange calendar integration to consider meetings.
- **Monitor Meeting Future:** Establishes the upper limit of the date range for the Exchange calendar integration to consider meetings.
- **Require External Attendees in Meetings**: This setting determines whether the system will prompt a user to complete a Meeting Recap after every instance of a meeting on a calendar, or only those meetings that have external contacts included (i.e. related events or personal items)
- **Onboarding Exchange Configuration:** Enable to include Exchange Host Configuration access as part of the Setup Wizard for new users. Note that your organization must have Exchange enabled as part of your initial implementation in order for this to work.
- **Created:** The date the account was provisioned.
- **Last Modified:** The date the account details were last updated.

3 Select the **Edit** link at the top of the Organization details section.



4 Edit the necessary fields in the **Edit Organization** window.

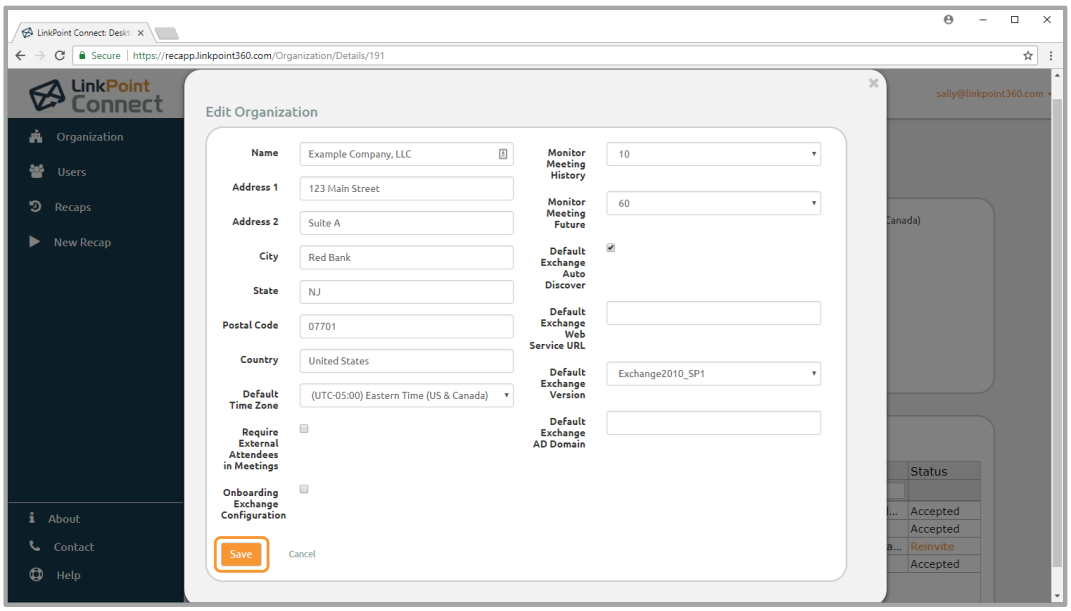


Tip: Note that additional fields are included in the Edit window than are displayed on the Organization screen. For companies with the Microsoft Exchange integration enabled, these fields help determine how users throughout the account will establish this connection. This integration is disabled by default for all new accounts. These will establish the default values for all users.

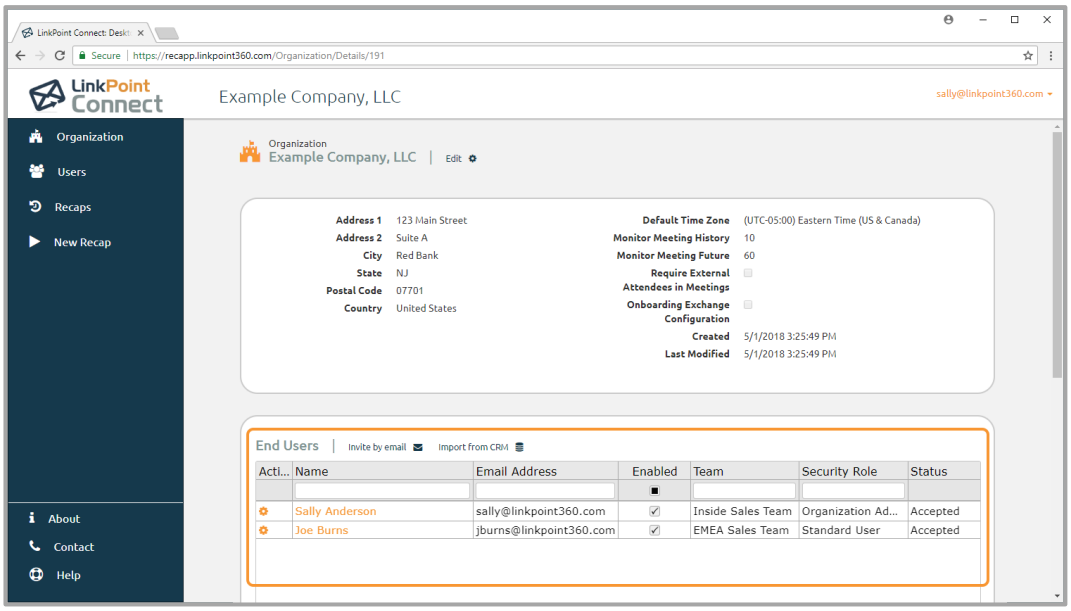
- **Default Exchange Autodiscover:** Select the option to use Autodiscover to identify how Desktop Plus Edition can connect to Exchange.
- **Default Exchange Autodiscover URL:** Some organizations configure their Exchange environments to block autodiscover connections. Enter the URL in the provided field. This can be provided to you by your internal IT admin.
- **Default Exchange Version:** Some organizations configure their Exchange environments to block autodiscover connections. Enter the Exchange Version in the provided field. This can be provided to you by your internal IT admin.
- **Default Exchange AD Domain:** Some organizations require users to sign into their Exchange account using an Active Directory domain. Enter the domain in the provided field. This can be provided to you by your internal IT admin.

Additional Resources: Learn more about integrating with Exchange in the **Connecting to Microsoft Exchange** section of this User Guide.

5 Click the **Save** button when finished.

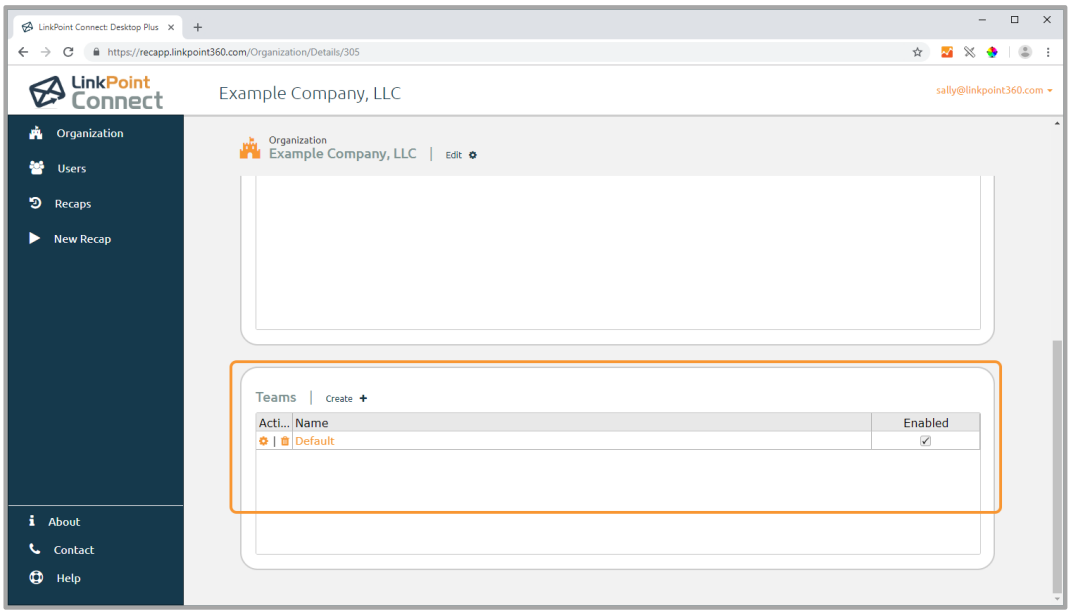


6 Review the **End Users** section for a list of Users associated with the account.



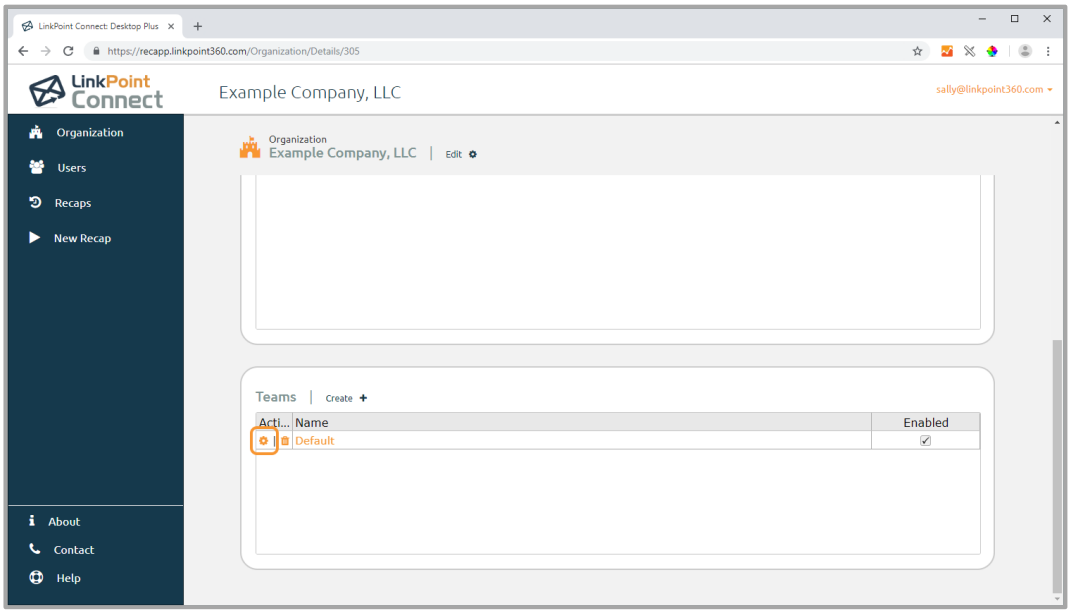
Additional Resources: Learn more about working with Users in the **Managing Users** section of this User Guide.

7 Review the **Teams** section for a list of available Teams or user groups associated with the account.

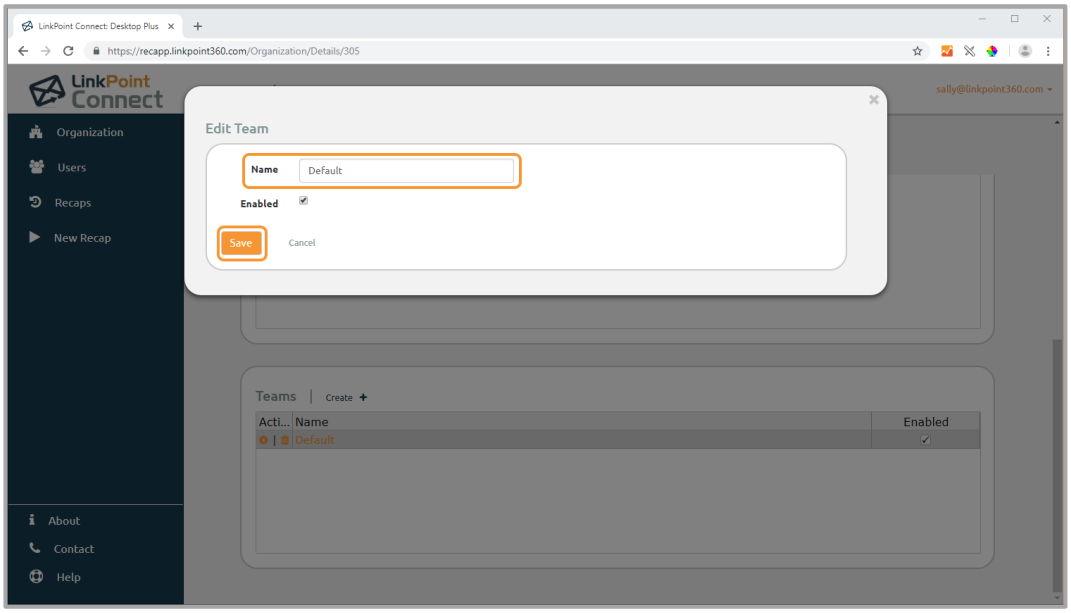


Tip: Teams cannot be deleted if there are users assigned to them. Since the Organization Admin is automatically assigned to the Default Team during the setup process for the account, the team must be renamed or the user must be reassigned before deleting the Default Team.

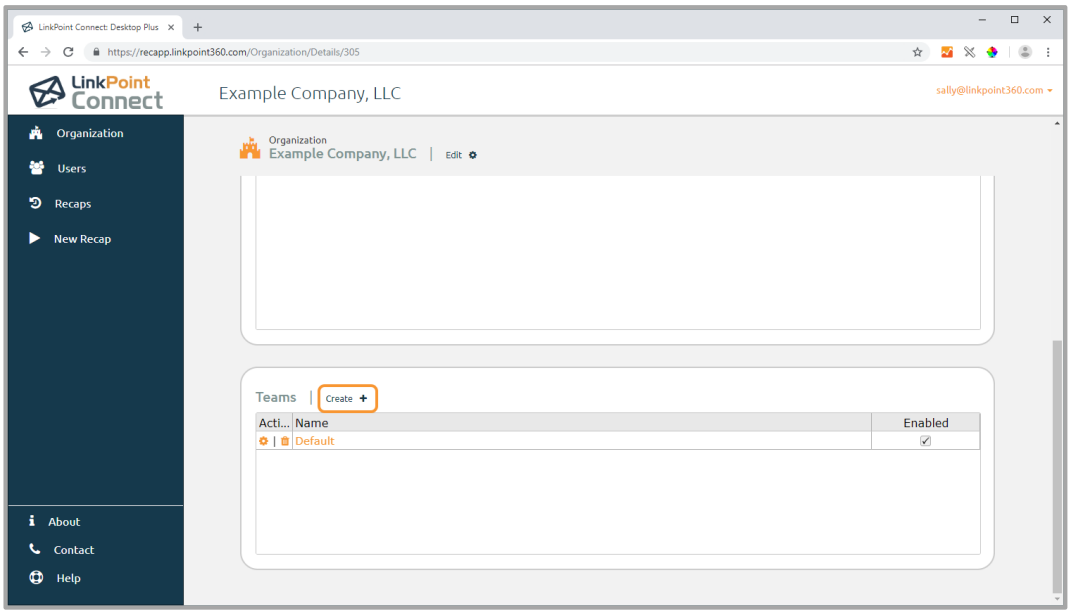
8 Click the **Edit** icon to update the Default Team.



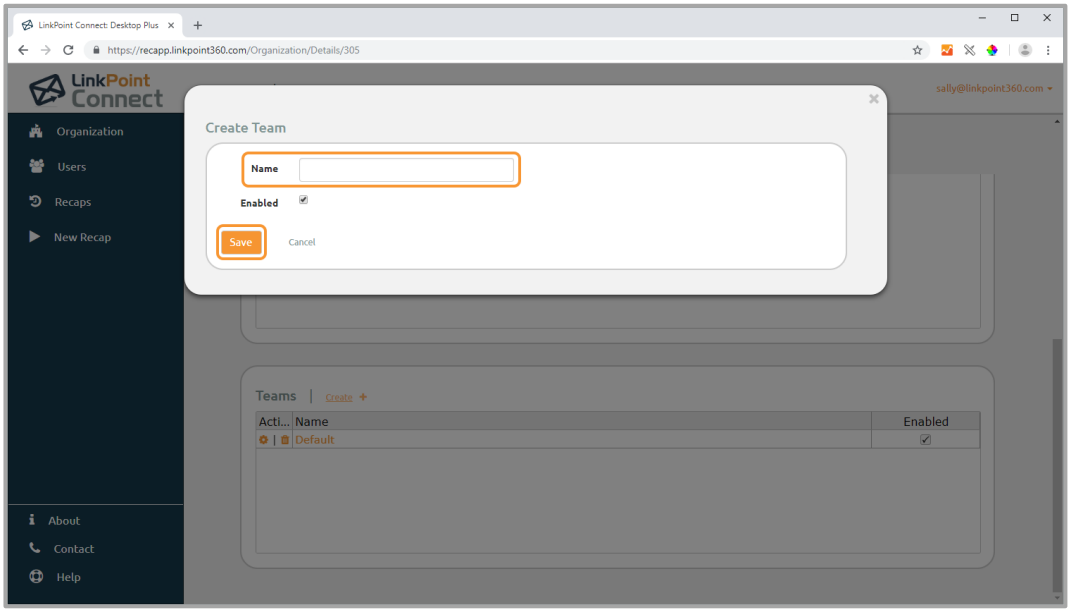
9 Change the **Name** in the Edit Team window and click the **Save** button when finished. Click **Close** to return to the Organization page.



10 Click the **Create** option in the Teams section to add a new Team to the account.



11 Enter the **Name** in the Create Team window and click the **Save** button to continue. Make sure that the **Enabled** checkbox is selected in order for the Team to be an available option when adding end users. Click **Close** to return to the Organization page.

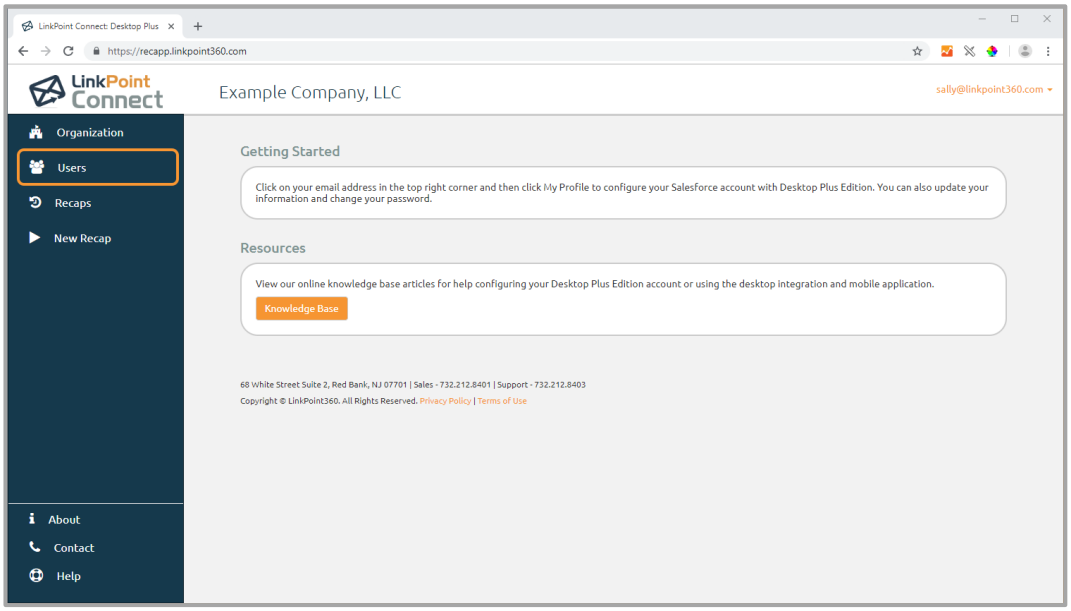


Managing Users

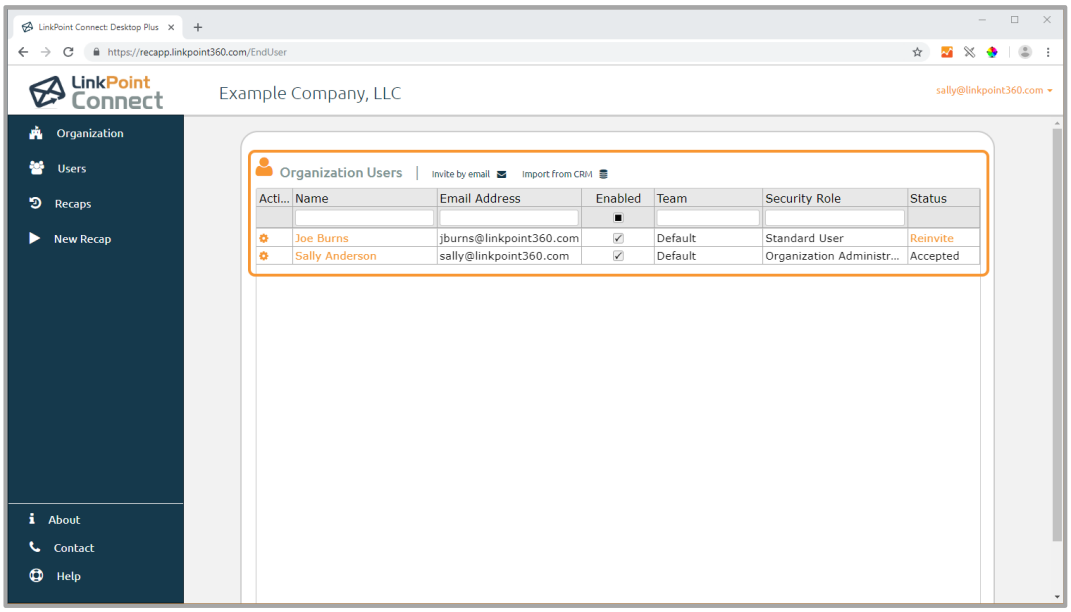
Desktop Plus Edition Admins can review and manage users throughout the system to ensure that the correct users have access to Meeting Recap. Each user is invited to participate via an automated email from the system. The user is prompted to connect their Microsoft Exchange and Salesforce accounts via the Setup Wizard and to download the LinkPoint Connect: Desktop Plus application to their mobile device. Each user can be enabled or disabled by the Organization Admin via the web portal. In this section, you will become familiar with the available options for user management.

Admin Only: This article outlines functionality available only to Desktop Plus Admins. Standard Users should advance to the next article in this User Guide.

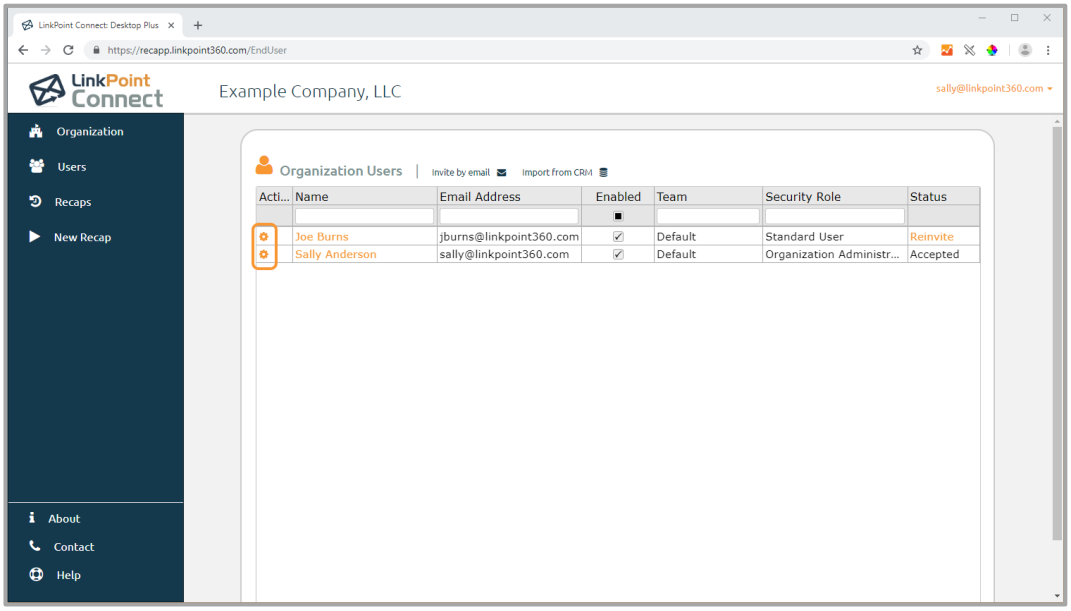
1 Log into Desktop Plus Edition and select **Users** in the left navigation.



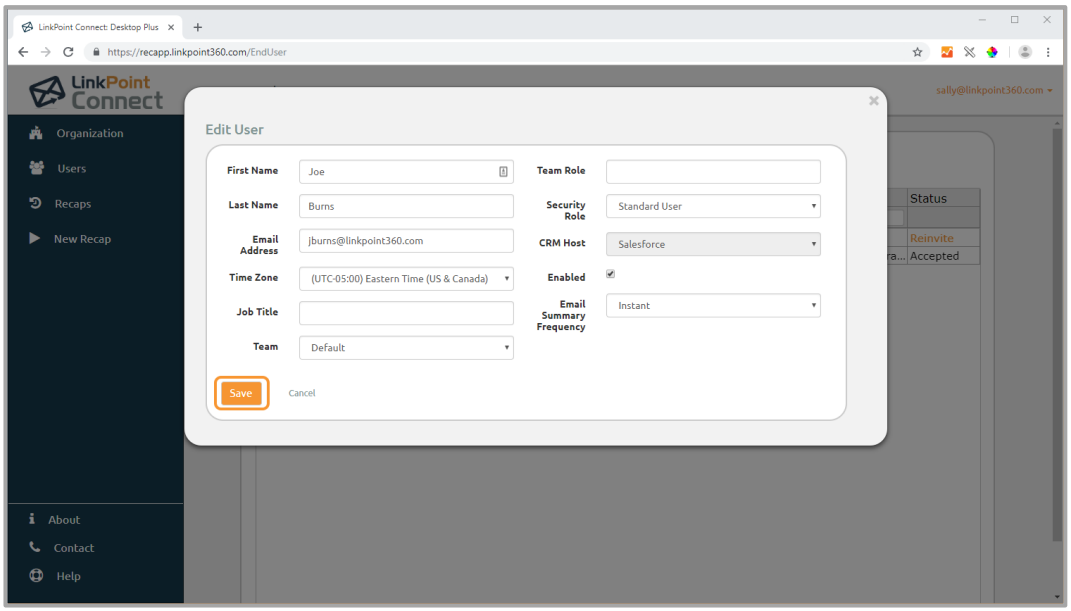
2 Review the **Organization Users** section for a list of Users associated with the account.



3 Select the **Edit** icon for a **User** to review and change their information.

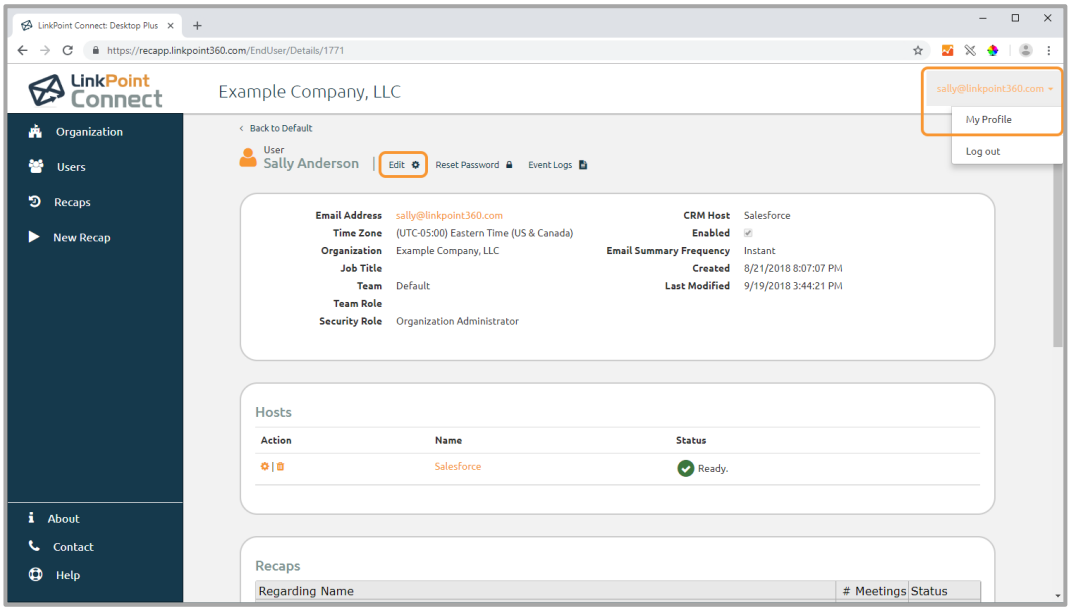


4 Edit the necessary fields within the **Edit User** window. Note that some fields may not be edited depending on permissions. Click the **Save** button when finished and then **Close** to exit the window.



Tip: Users cannot be deleted from the account once they are added. This security feature ensures data integrity for any information that may have been captured by users. Organization Admins can deselect the **Enabled** checkbox and click the **Save** button to disable the user.

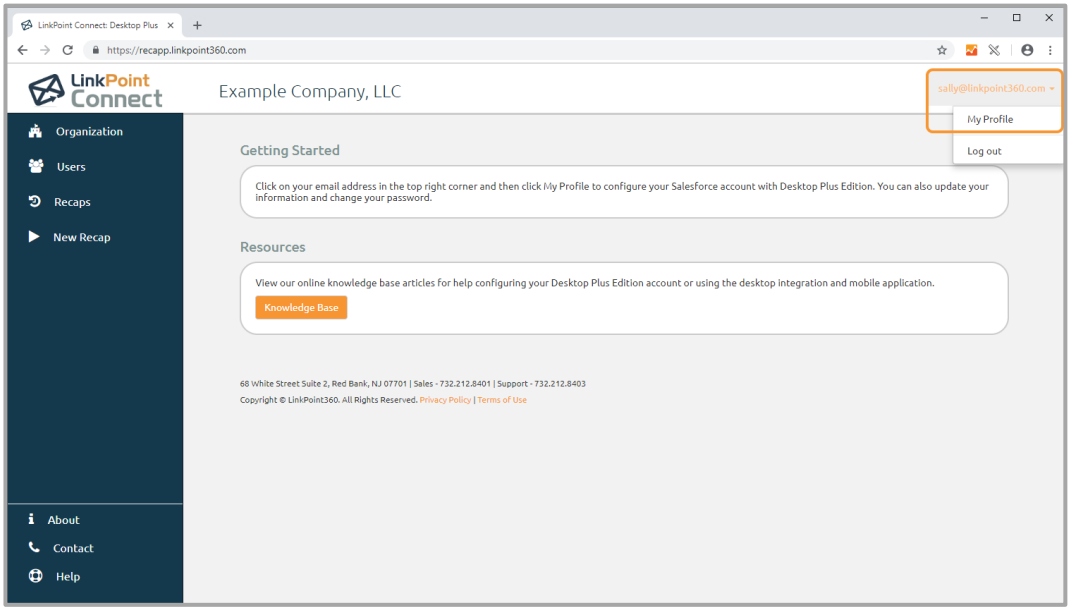
Tip: End users can also edit their own information by navigating to the My Profile option in the top right drop-down menu and then selecting the Edit link by their name at the top of the User page.



Reviewing User Details

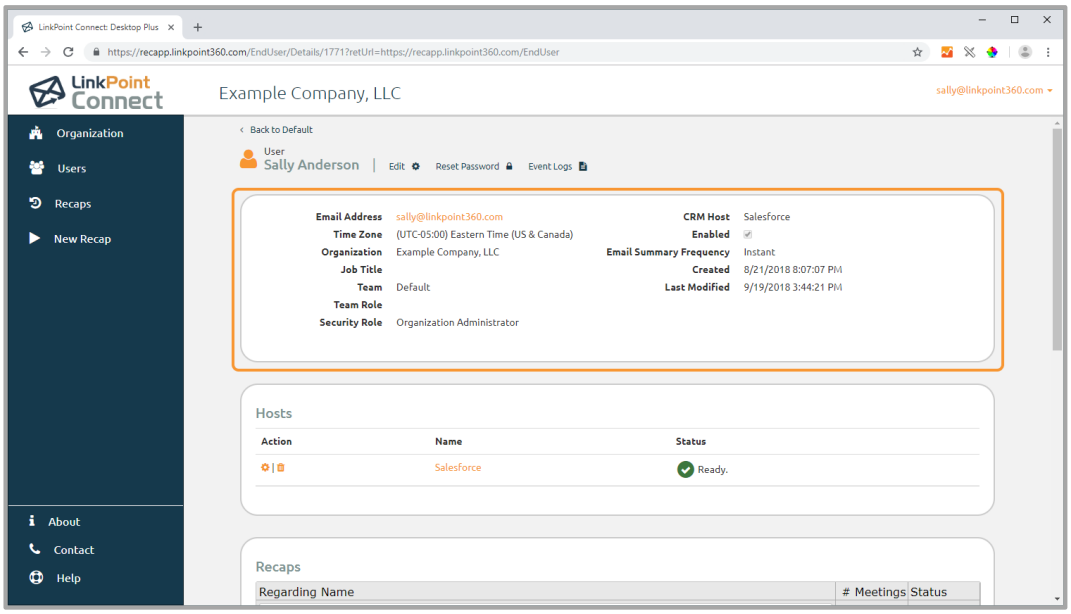
Desktop Plus Edition Admins can review and manage users throughout the system to ensure that the correct users have access to Meeting Recap. In this section, you will become familiar with the available options for user management.

1 Log in to Desktop Plus, and click the email address in the top right corner. Then click **My Profile**.



Tip: Admins can click the Users option in the left navigation and then select a User from the list to view and update as needed.

2 Review the available **User** details.

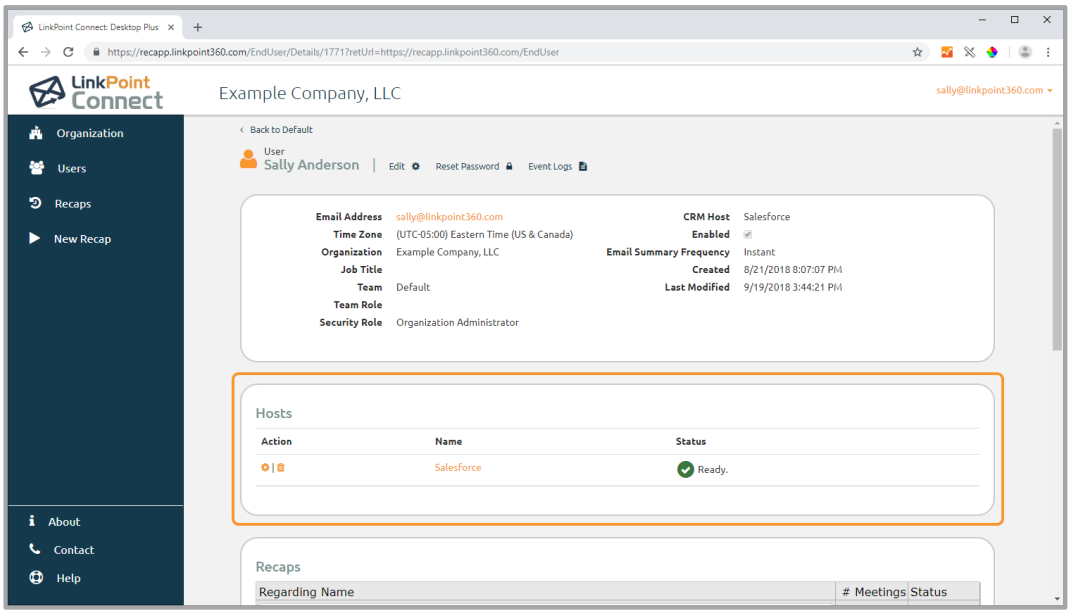


- **Email Address:** The email address that the user will use to log into their Desktop Plus account and receive notifications from the system.
- **Time Zone:** The time zone where the user is working. This setting is used to manage when the sync operations are run for that particular user.
- **Organization:** The company using the Desktop Plus account.
- **Job Title:** The job title or function of the individual, populated during the set up process.
- **Team:** The group of users that the individual belongs to. Teams are useful for grouping users with similar responsibilities who will work with the same set(s) of questions.
- **Team Role:** A secondary grouping of users. Team roles are useful if there are subsets of users within a Team that will work with the same set(s) of questions.
- **Security Role:** The level of permission to make changes and manage the account. Users only have the access to change their own Profile details.
- **CRM Host**: The CRM that will be integrated with the Desktop Plus account.
- **Email Host:** The email system that will be integrated with the Desktop Plus account.
- **Enabled:** This flag indicates whether the user profile is active.
- **Created:** The date the user was provisioned.
- **Last Modified:** The date the user details were last updated.

Tip: Select the **Edit** link by the User Name to update or change the information displayed.

Additional Resources: Refer to the **Managing Users** section of this User Guide for more information.

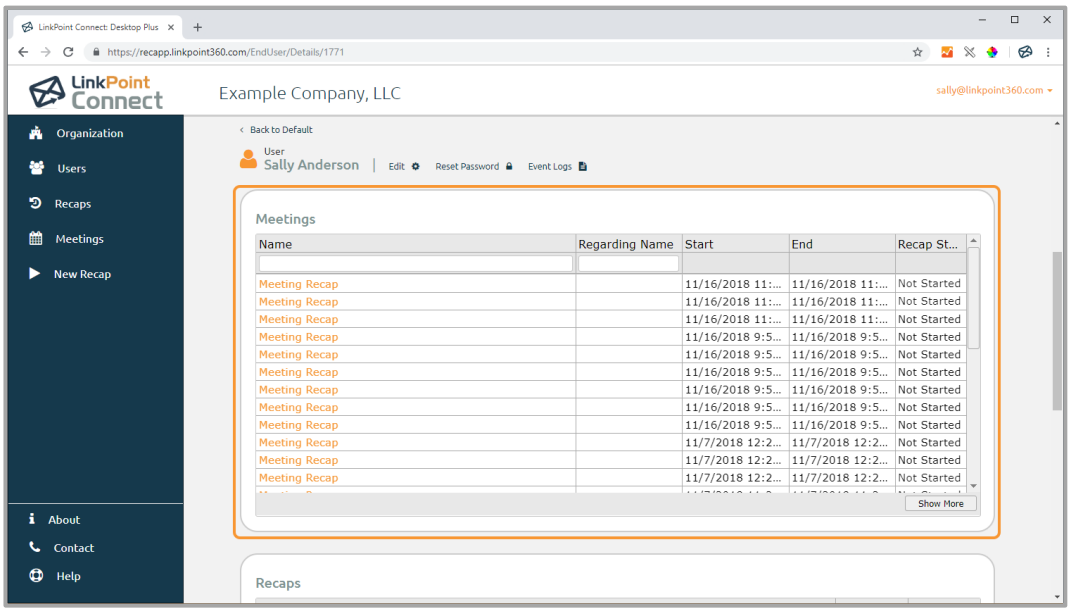
3 Review the **Hosts** section for connection status for Salesforce and/or Exchange. Click the **Edit** icon to edit the credentials. Click the **Delete** icon to disconnect. You can click on each Host name to view connection details.



Tip: Integration with Microsoft Exchange is off by default for all new accounts and must be requested as part of the implementation process.

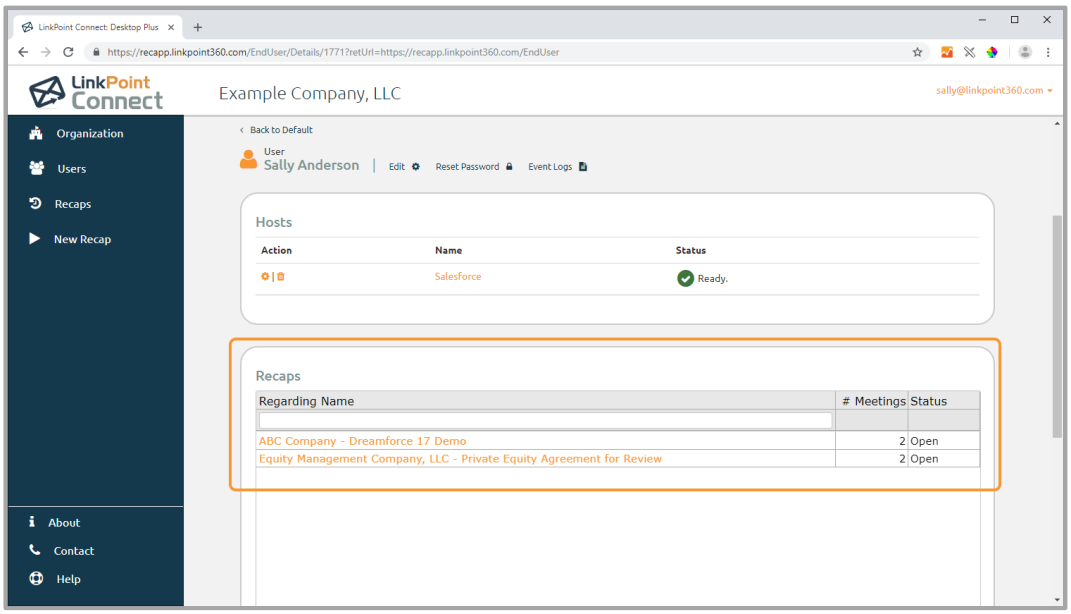
Additional Resources: Refer to the **Connecting to Salesforce and Connecting to Microsoft Exchange** sections of this User Guide for more information.

4 Review the **Meetings** section for a listing of all calendar items recognized by the system for association with a Meeting Recap.



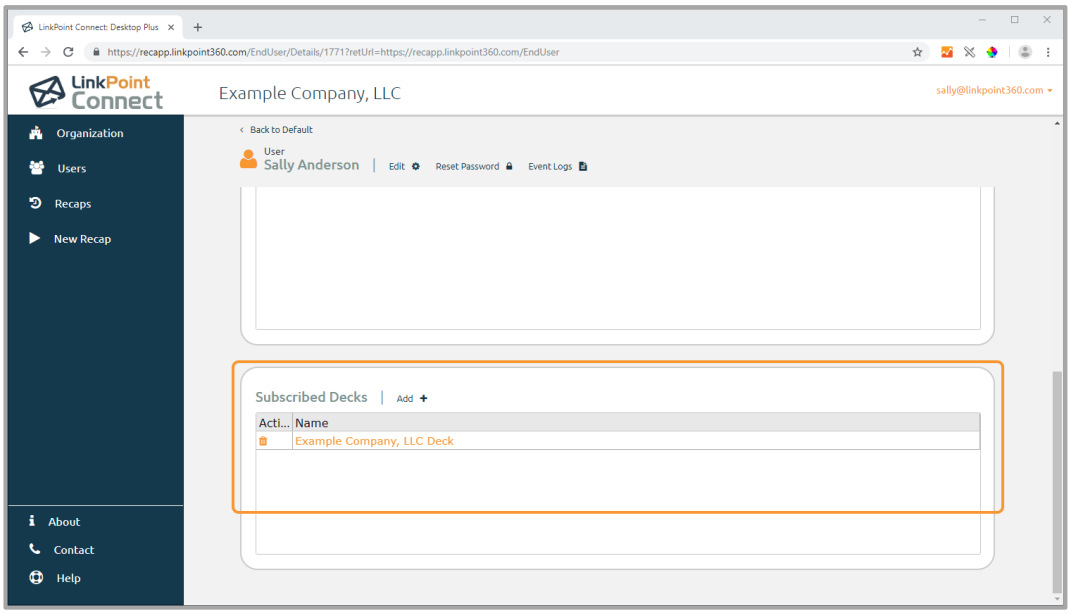
Tip: Integration with Microsoft Exchange is off by default for all new accounts and must be requested as part of the implementation process. New users may not immediately see data populated in this table.

5 Review the **Recaps** section for a listing of all Open and Completed Meeting Recaps attributed to the User. Note that this section will be blank when the Desktop Plus account is first created.



- **Regarding Name:** The name of the object in Salesforce that the meeting has been related to such as an Opportunity record.
- **# Meetings:** The number of calendar items in Microsoft Exchange that are related to the Recap.
- **Status:** An indicator as to whether the Recap is not started, in progress, or completed.

6 Review the **Subscribed Decks** section. Decks are sets of predefined questions available for use. This section will display all of the decks that have been made available for the specific user.



Completing a Meeting Recap

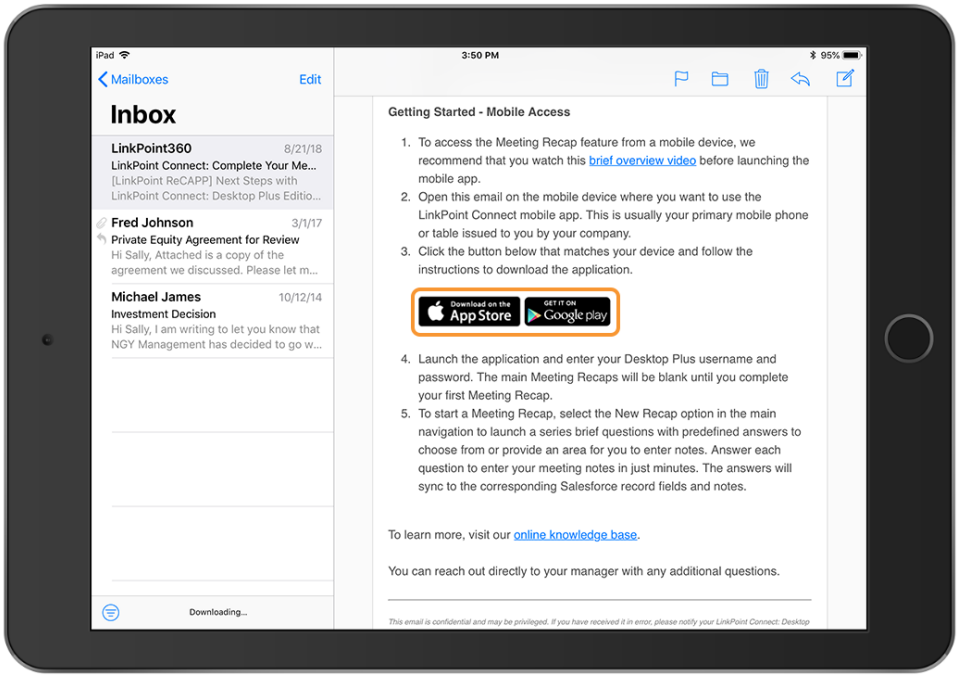
Recapping a Meeting with the Mobile Application

Desktop Plus settings and user administration are managed in the Desktop Plus web portal. Once account configuration is completed, the Desktop Plus experience shifts to the mobile application. All users receive an automated email once they have configured their accounts with instructions to download the LinkPoint Connect: Desktop Plus mobile application. In this section, you will learn how to recap a meeting with the LinkPoint Connect: Desktop Plus mobile application. While screenshots demonstrate functionality on the iOS platform, the application operates the same for Android system users.

Warning: Before you can complete a Meeting Recap, you must complete the Setup Wizard. The Setup Wizard includes steps to create your user name and password as well as to connect to Salesforce.

Tip: A Meeting Recap is a collection of questions (and their responses) regarding a specific record in Salesforce such as an Opportunity or Account.

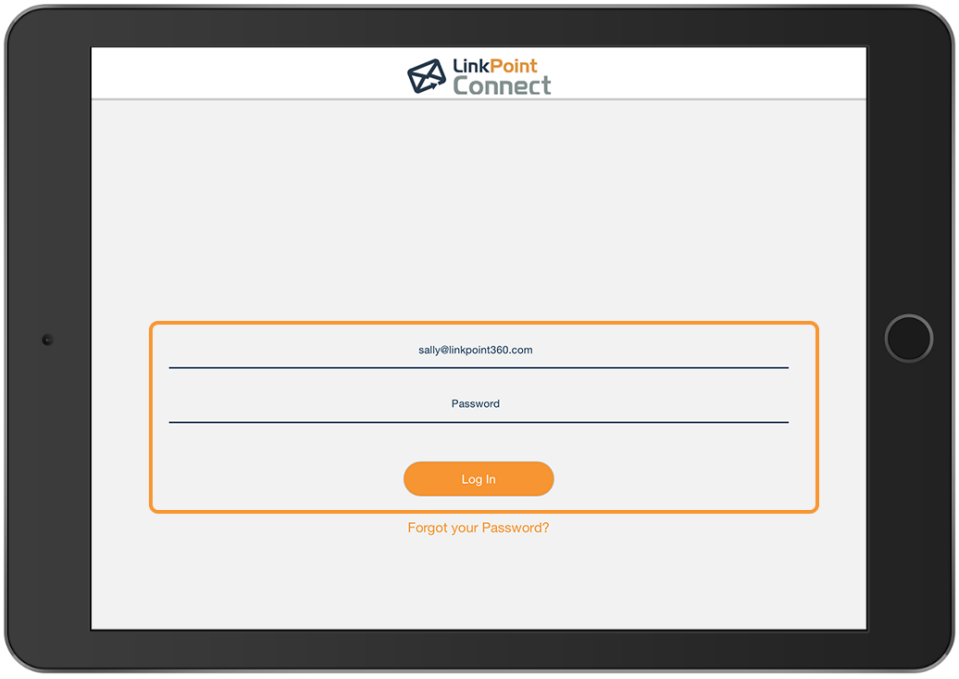
1. Download the **LinkPoint Connect: Desktop Plus mobile application** to your device via the links provided in the **Getting Started** email.



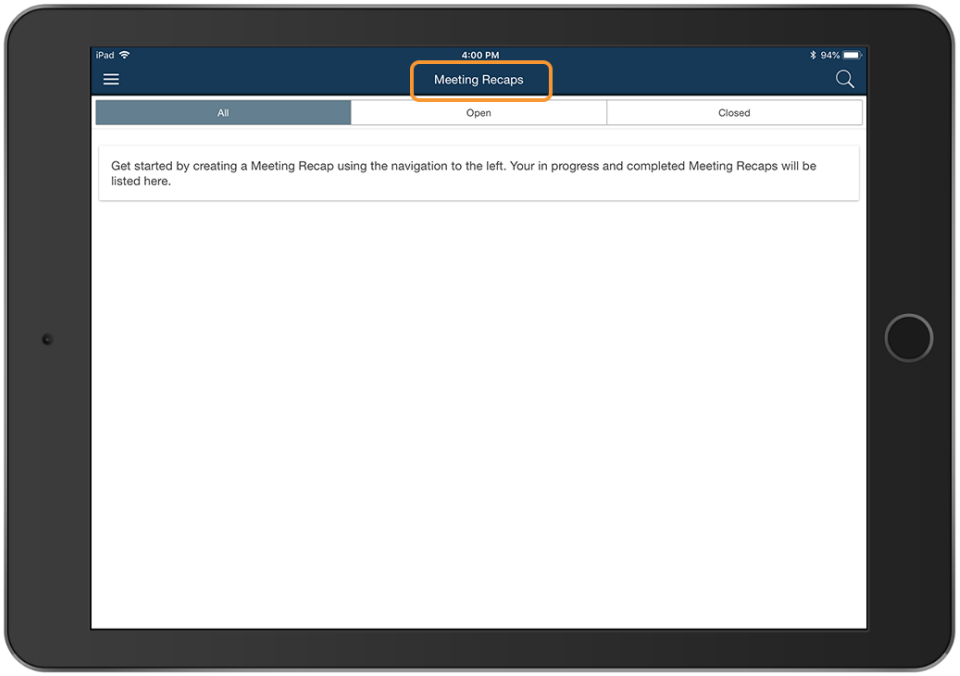
Tip: You can download the mobile application to more than one device for use with your account. Many users choose to install on both their mobile phone as well as a corporate issued tablet.

2 Launch the **LinkPoint Connect: Desktop Plus** application on your mobile device.

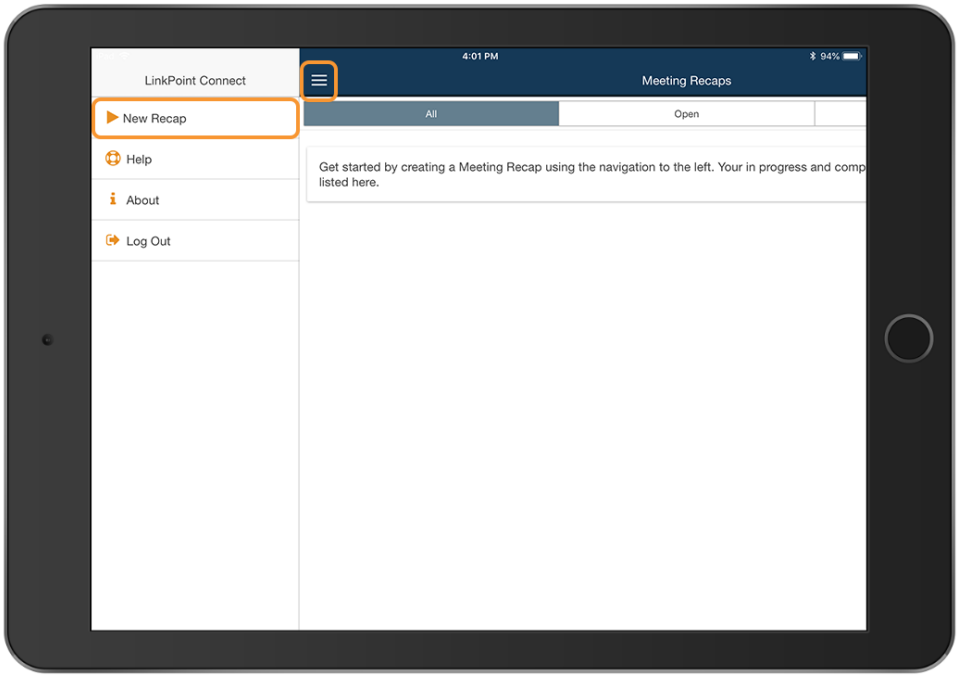
3 Enter the **Username** and **Password** you created in the Setup Wizard for the Desktop Plus web portal, and then tap the Log In button.



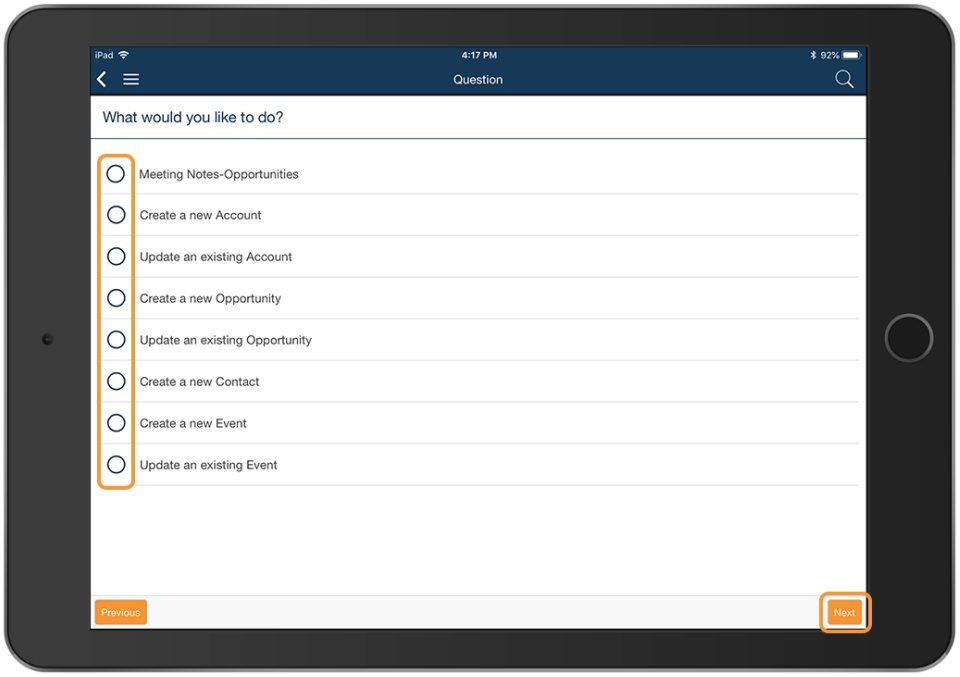
4 Review the **Meeting Recaps** screen. This screen will be empty for new users who have not started a Meeting Recap. Returning users will see a listing of all Meeting Recaps related to their account.



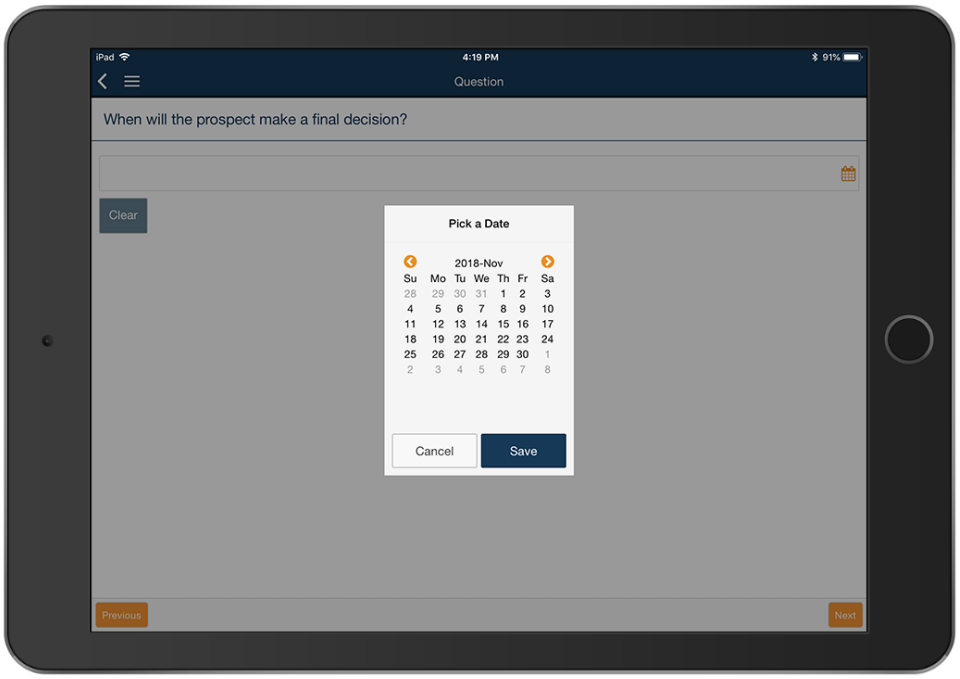
5 Select the **main menu** icon and tap **New Recap** to start a Meeting Recap and submit your meeting notes or feedback.

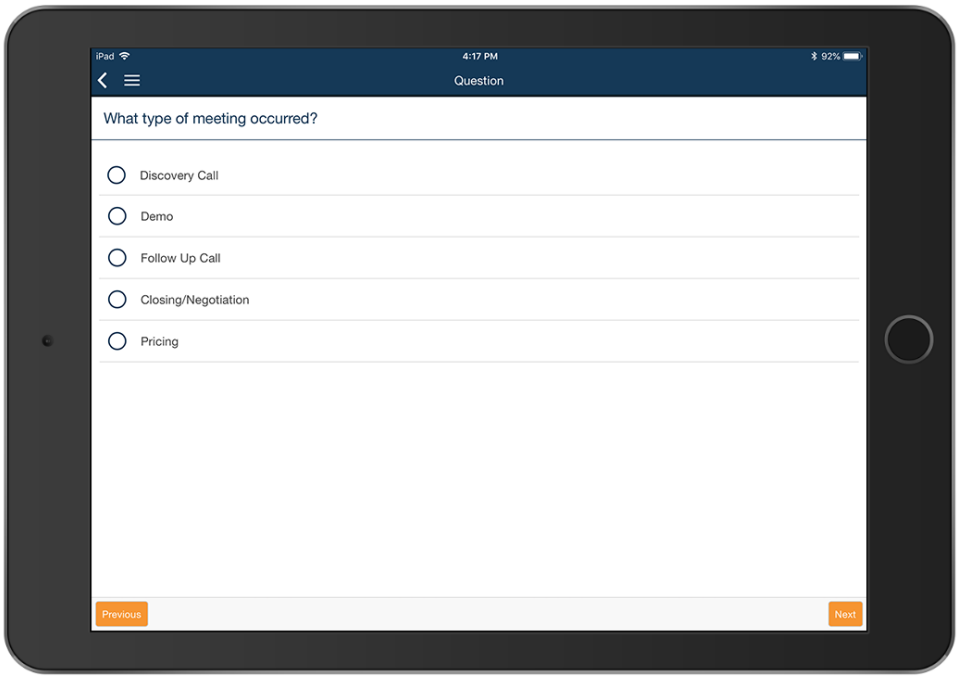


6 Advance through the presented questions, selecting from predefined answers or enter content in the available text, number, or date fields as needed. Your submissions will be mapped back to specific Salesforce fields once complete.



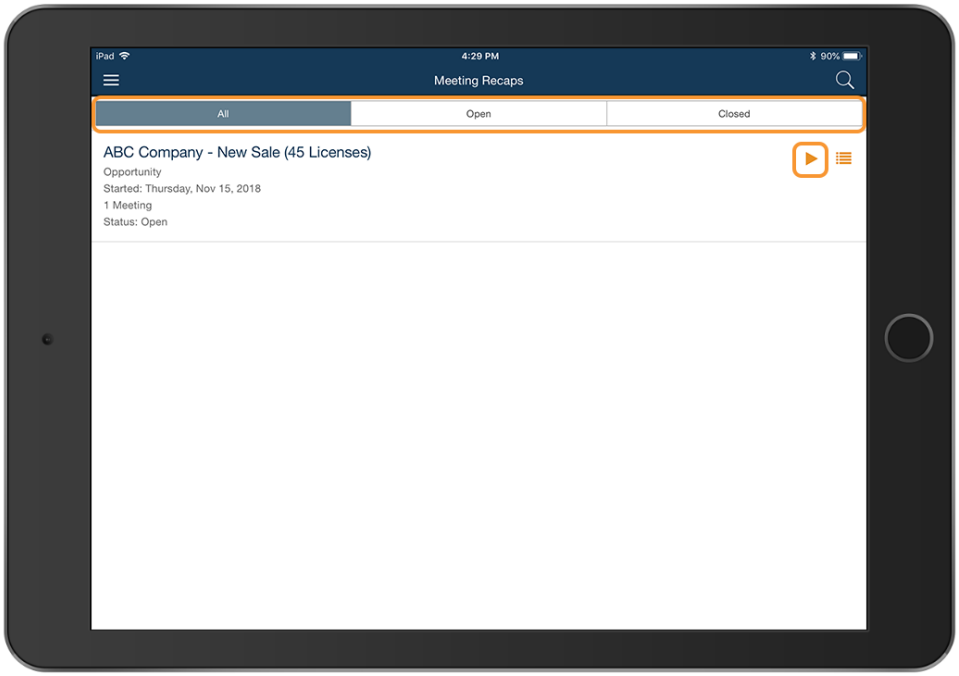
Tip: Your instance of Desktop Plus will present questions specific to your organization's set up. The images in this user guide are based on sample data.



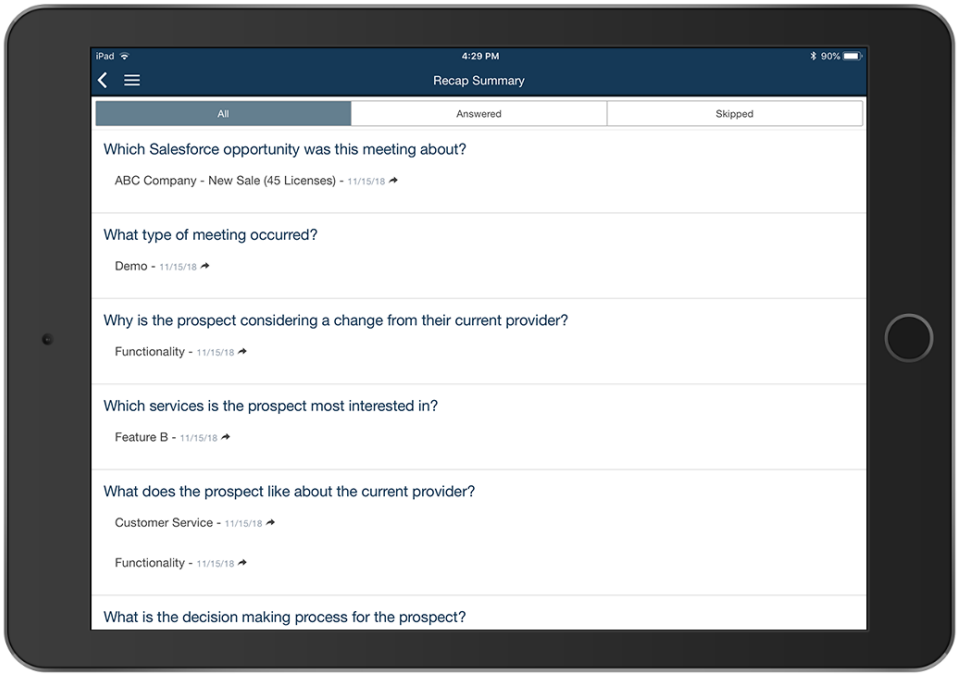


Warning: Use the **Next** and **Previous** buttons to move between questions and save your answers. Tapping the main application back button **<** will exit the questionnaire and will not save your answers.

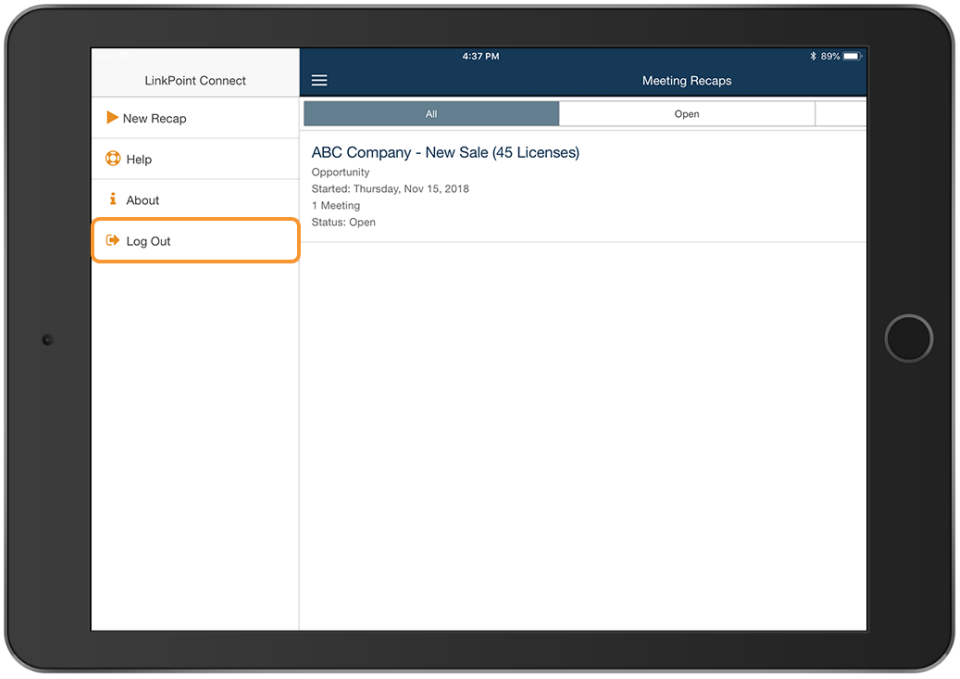
7 Review any **Open** or **Closed** Meeting Recaps on the **Meeting Recaps** screen. Tap the **Play** icon to launch the Meeting Recap and update or answer any remaining items.



8 Tap the **List** icon on the Meeting Recaps screen to view a listing of all questions and their corresponding answers, where provided. Tap any question to update a submission.



9 Select the **main menu** icon and tap **Log Out** to close the mobile application.



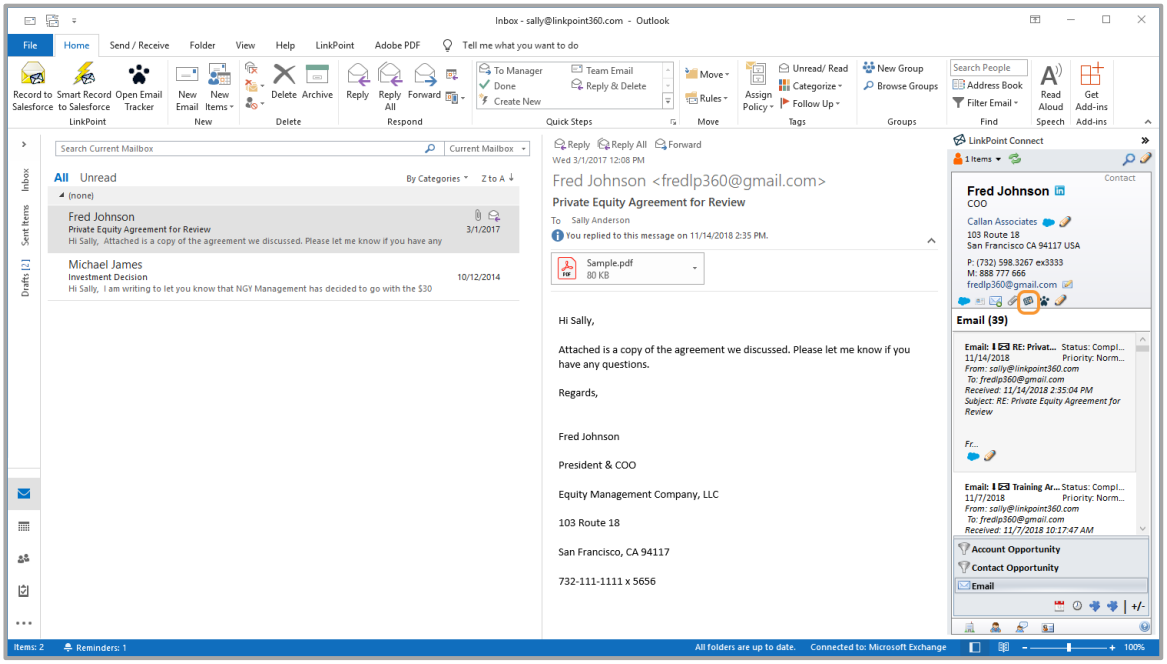
Recapping a Meeting from the Side Panel

Desktop Plus settings and user administration are managed in the Desktop Plus web portal. Once account configuration is completed, the Desktop Plus experience shifts to Meeting Recap feature. Depending on your configuration, you may have access to Meeting Recap within the LinkPoint Connect Side Panel. In this section, you will learn how to recap a meeting with the LinkPoint Connect: Desktop Plus from the Side Panel with Microsoft Outlook.

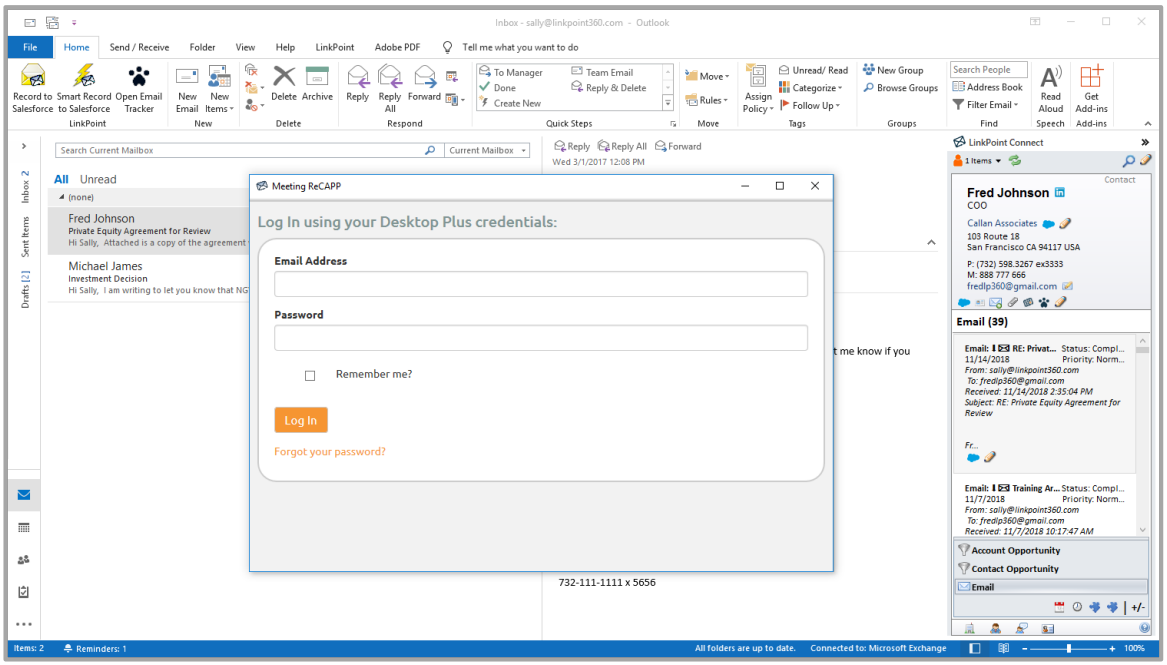
Warning: Before you can use the Meeting Recap Side Panel icon or mobile app, you must complete the Setup Wizard. The Setup Wizard includes a step to connect to Salesforce which is required to sync a Meeting Recap.

Tip: A Meeting Recap is collection of questions (and their responses) regarding a specific record in Salesforce such as an Opportunity or Account.

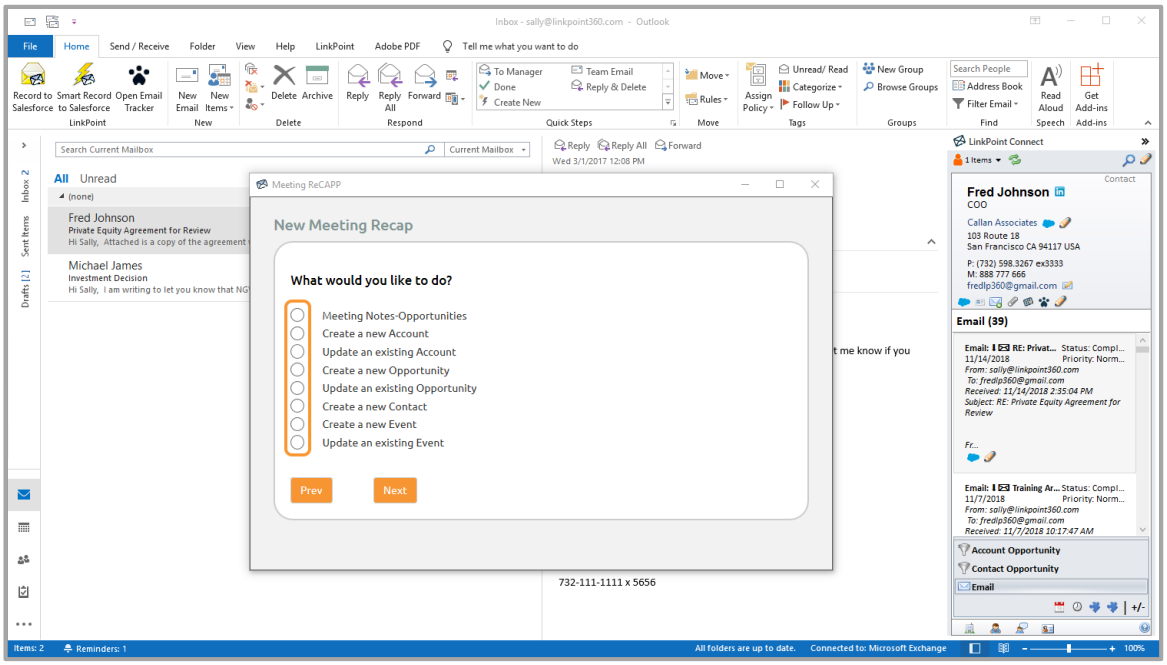
1. Locate the **LinkPoint Connect Side Panel** within Microsoft Outlook, and click the **Meeting Recap** icon.



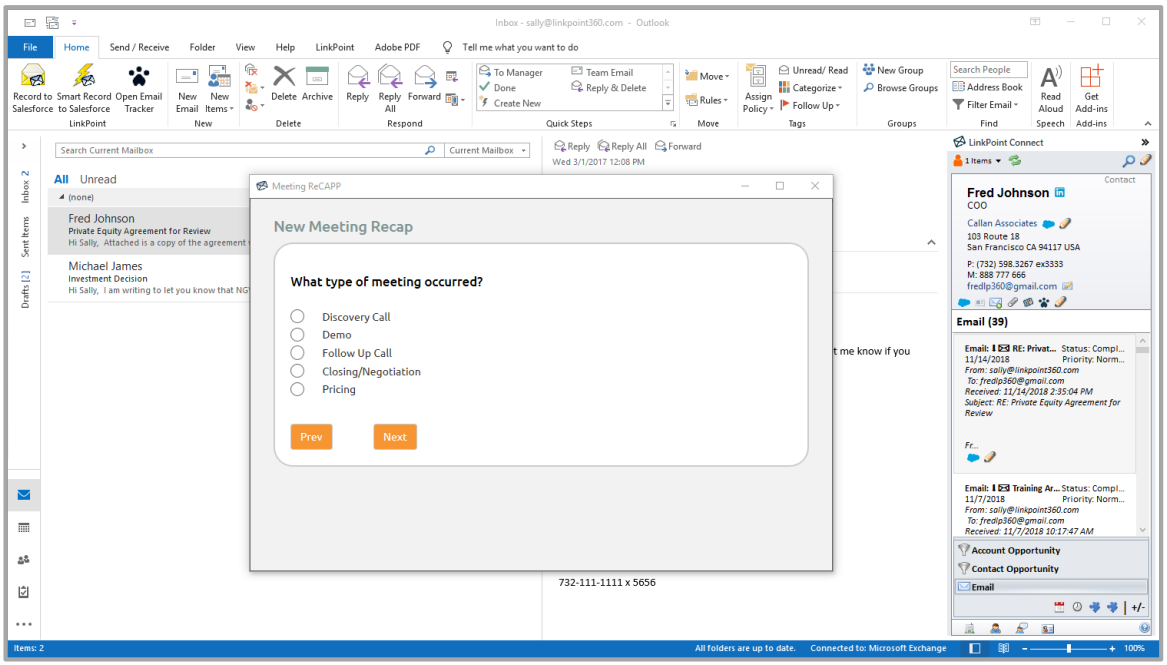
2 Enter the **Email Address** and **Password** you used in the Setup Wizard for the Desktop Plus web portal, and then click the **Log In** button.

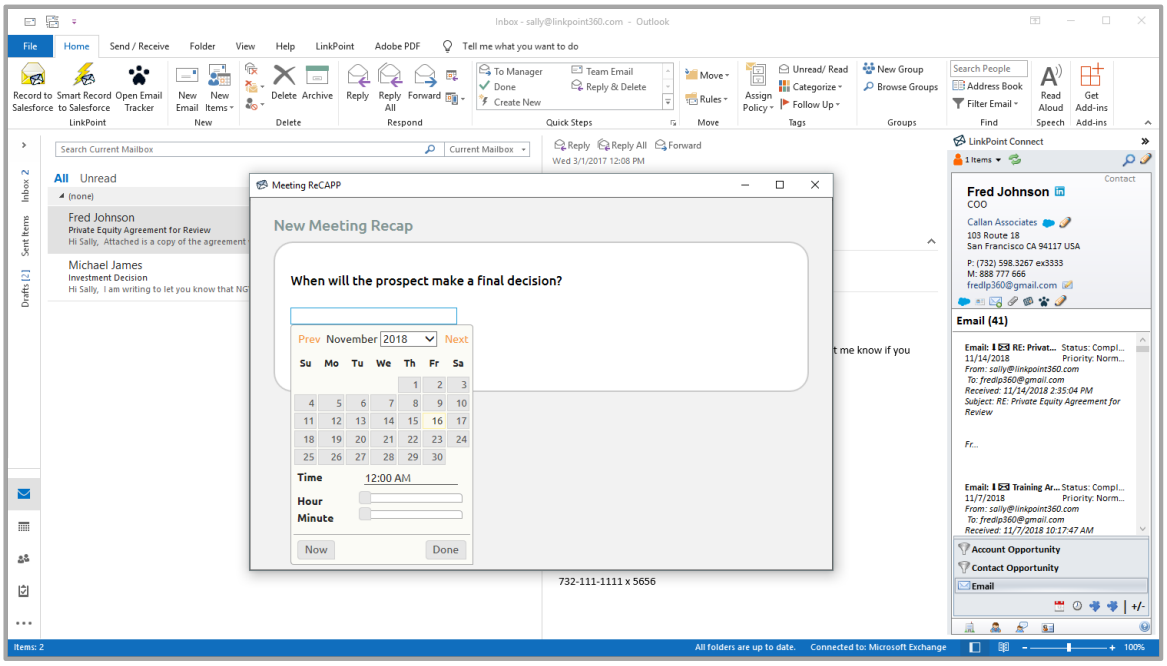


3 Advance through the presented questions, selecting from predefined answers or enter content in the available text, number, or date fields as needed. Your submissions will be mapped back to specific Salesforce fields once complete.



Tip: Your instance of Desktop Plus will present questions specific to your organization's set up. The images in this user guide are based on sample data.





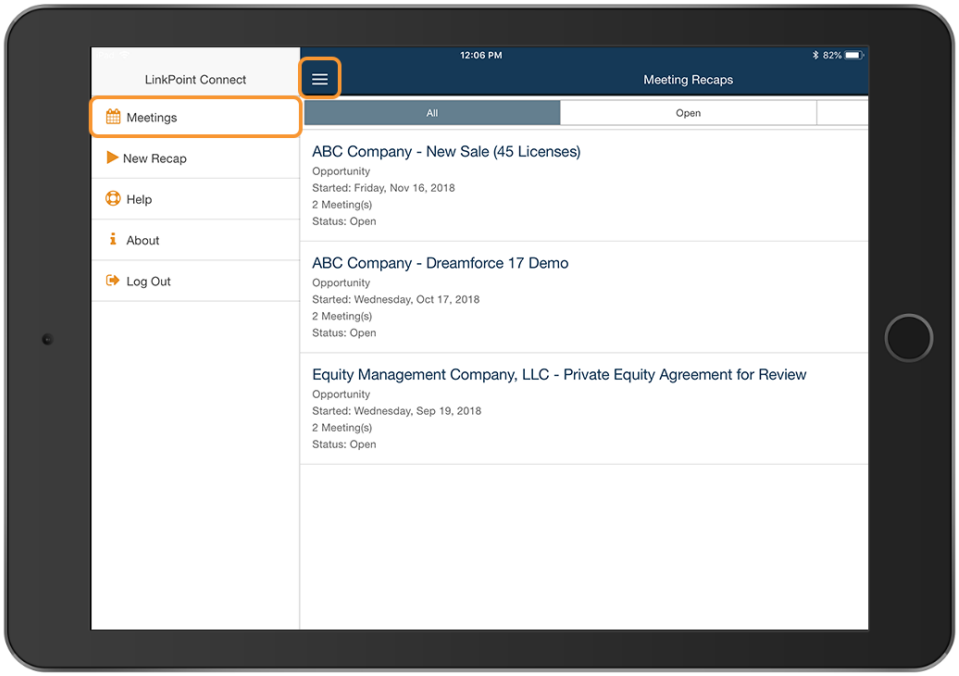
Warning: Use the **Next** and **Previous** buttons to move between questions and save your answers. Clicking the X for the Meeting Recap window .

Working with Microsoft Exchange Meetings

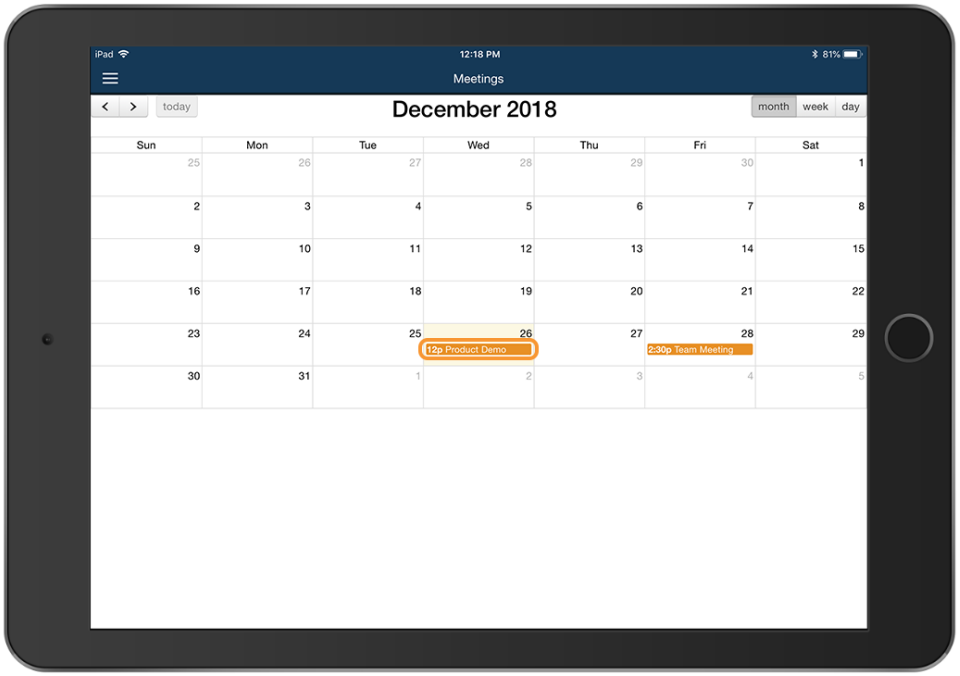
Desktop Plus Edition integrates directly with Microsoft Exchange and imports meeting data for calendar items that the user created and that include invitees. Private items are not imported from Exchange. This feature is off by default but can be enabled as part of the implementation process. This added integration allows users to tie Meeting Recaps to specific calendar events. In this section, you will become familiar with the additional features available with the integration to Microsoft Exchange for Desktop Plus Edition.

Warning: The information outlined in the following steps will not take effect if your organization does not have the Microsoft Exchange integration enabled. Users will also need to individually connect to their Exchange accounts as part of the Setup Wizard.

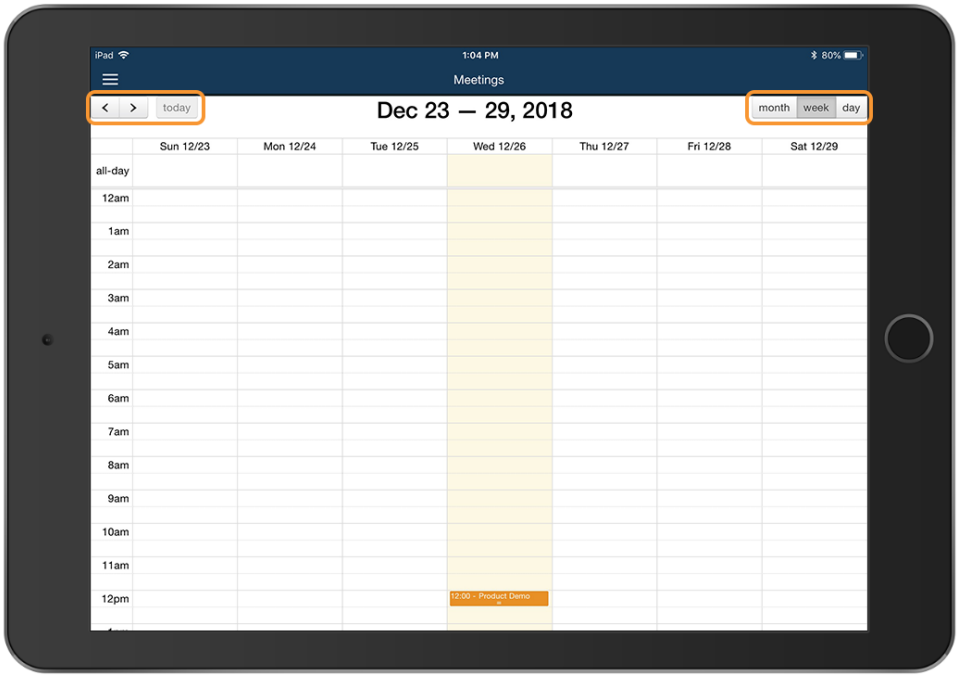
1. Launch the LinkPoint Connect: Desktop Plus Edition mobile application. Then select the **main menu** icon and tap **Meeting Recaps** to view the calendar.



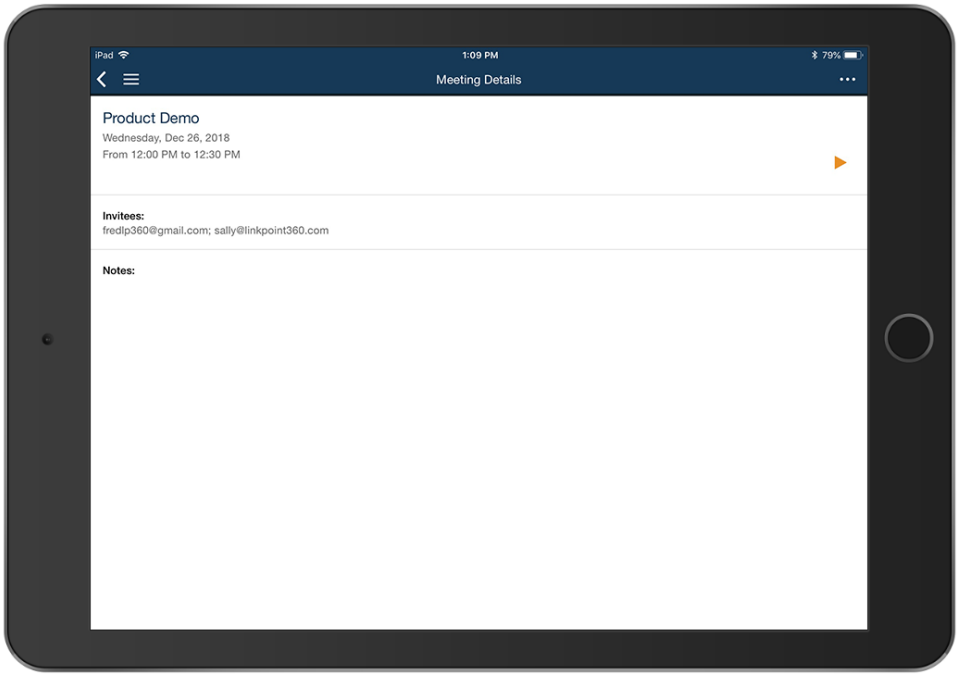
2 Tap a **Calendar Item** to proceed to the **Meeting Details** page.



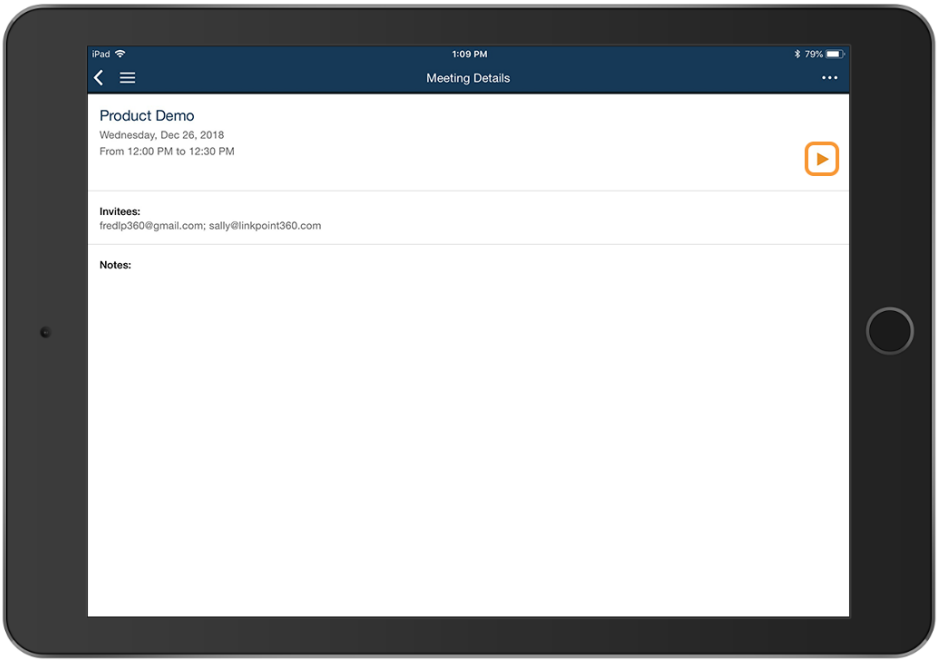
Tip: Tap on the **Month**, **Week**, or **Day** buttons to change the calendar view. Tap the **<** and **>** buttons to advance the calendar as needed. Tap the **Today** button to return the calendar view to the current date.



3 Review the **Meeting Details** and use the information to determine whether the meeting requires a Meeting Recap.

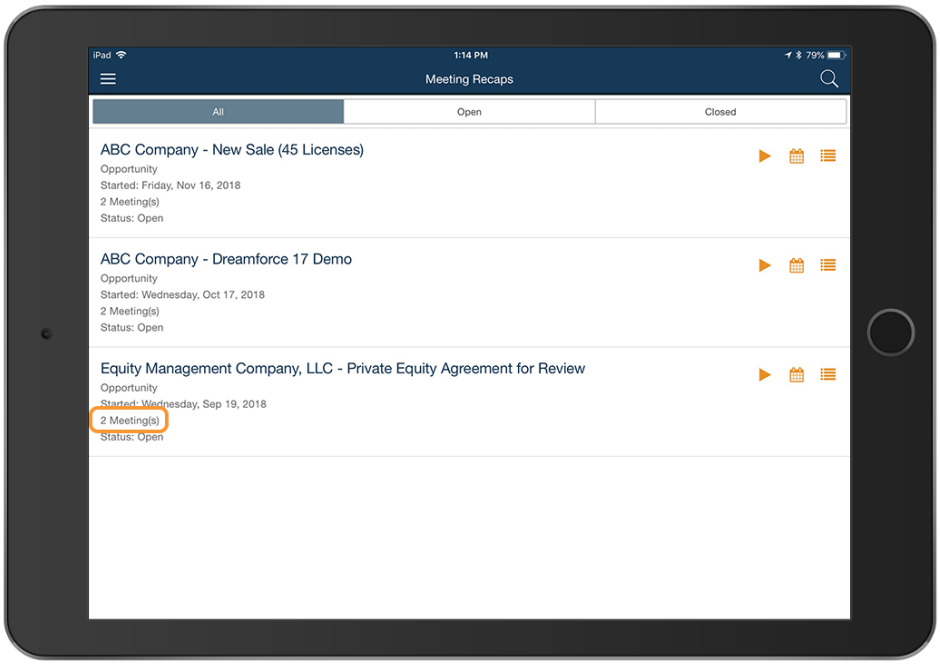


4 Tap the play button to start or resume a Meeting Recap. Complete the Meeting Recap as needed.



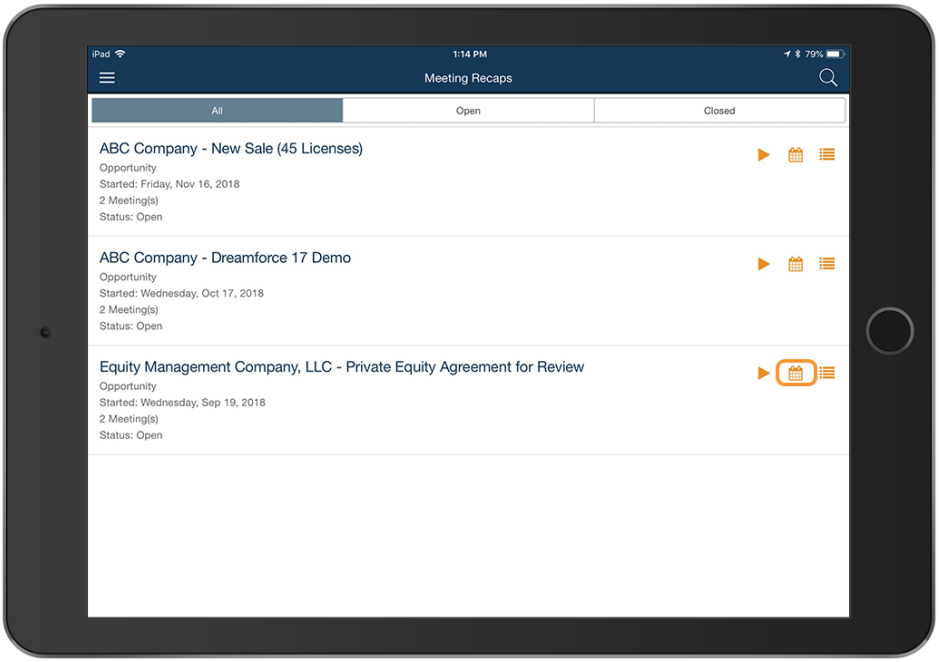
Additional Resources: Refer to the **Recapping a Meeting with the Mobile Application** section of this User Guide for more information.

5 Return to the Meeting Recaps screen and view the number of meetings related to each Meeting Recap.

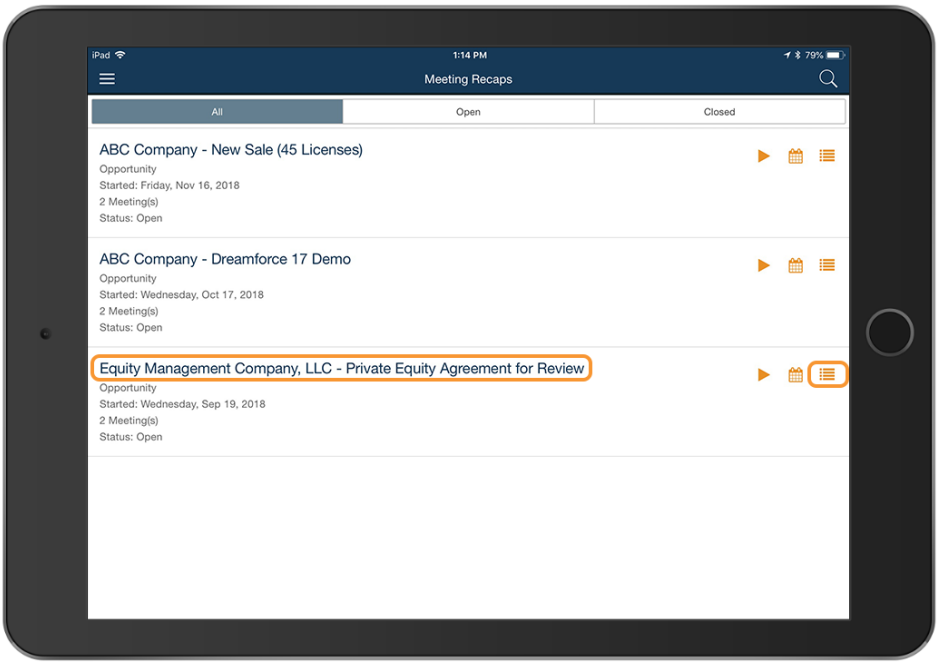


Tip: The Microsoft Exchange integration allows users to create multiple Meeting Recaps for a single Salesforce record. For example, many users have multiple meetings regarding the same Account or Opportunity.

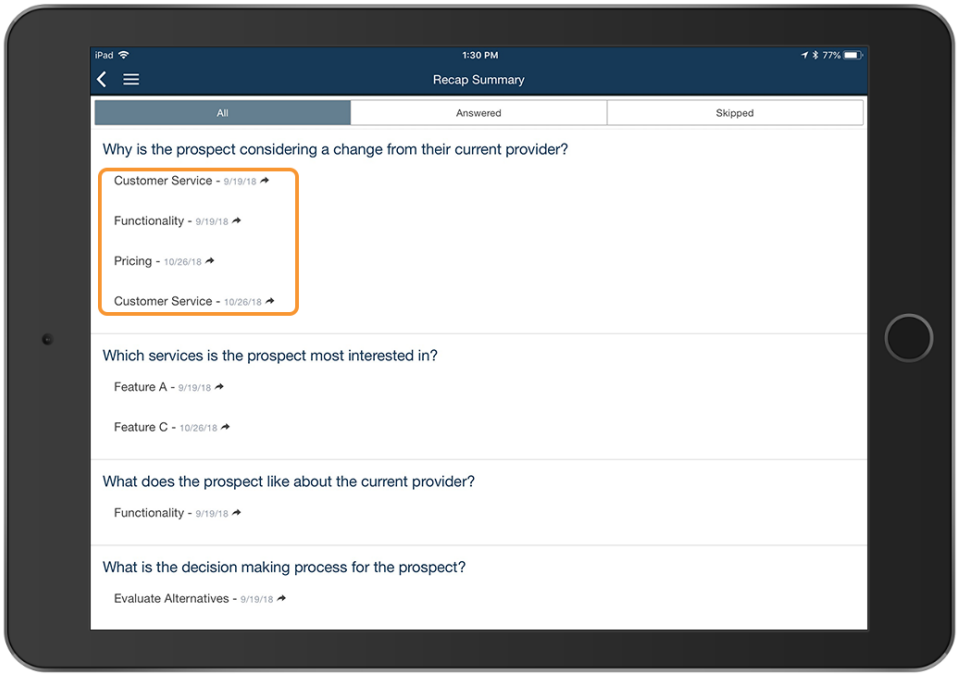
6 Tap the Calendar icon to view a list of each Meeting Recap that coorresponds to the same Salesforce record.



7 Tap the Meeting Recap name or the **List** icon to view submitted responses.



8 Review the submitted responses.



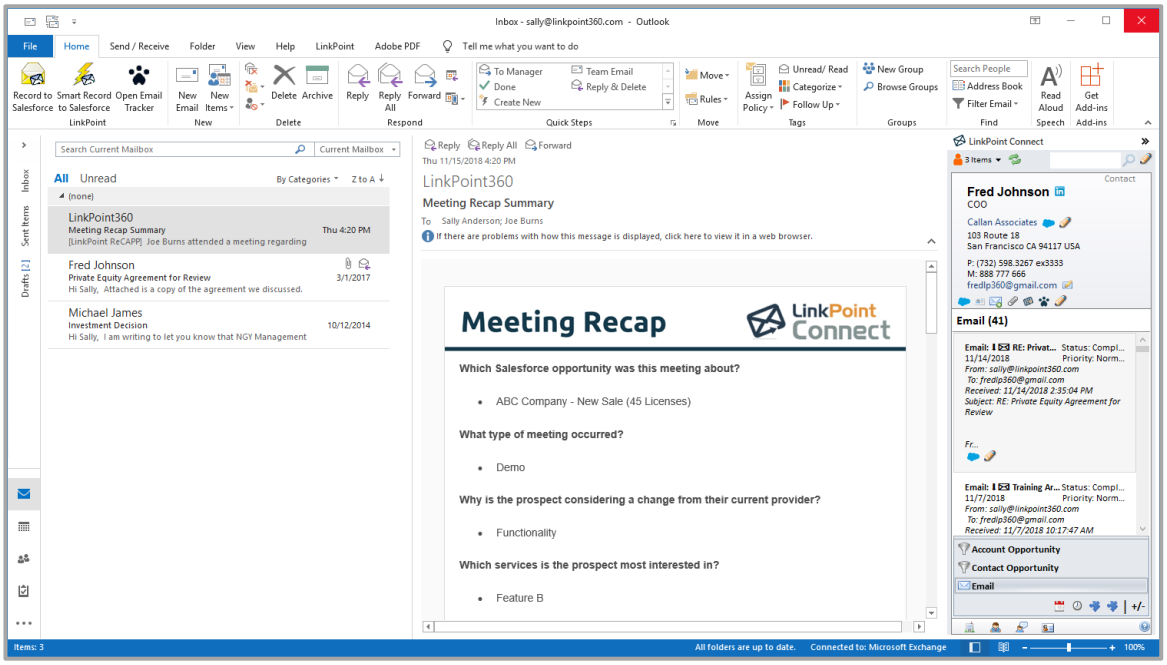
Tip: As you complete your Meeting Recap, be sure to associate it with the correct Salesforce record. Desktop Plus Edition will append the information from multiple Meeting Recaps to a single Meeting Summary and will detail the individual answers submitted for each question along with the date the answer was submitted.

Reviewing Meeting Recap Summaries and Updates

When a user completes a Meeting Recap, an email notification is sent to the Organization Administrator(s) and any related Team Administrators. A copy of the content is also added to the related Salesforce record. The email content includes all of the questions and answer choices along with the meeting details. Meeting Recap Summaries are designed to give management insight into staff interactions with prospects and customers. In this section, you will learn how to review a Meeting Recap Summary via email and Salesforce.

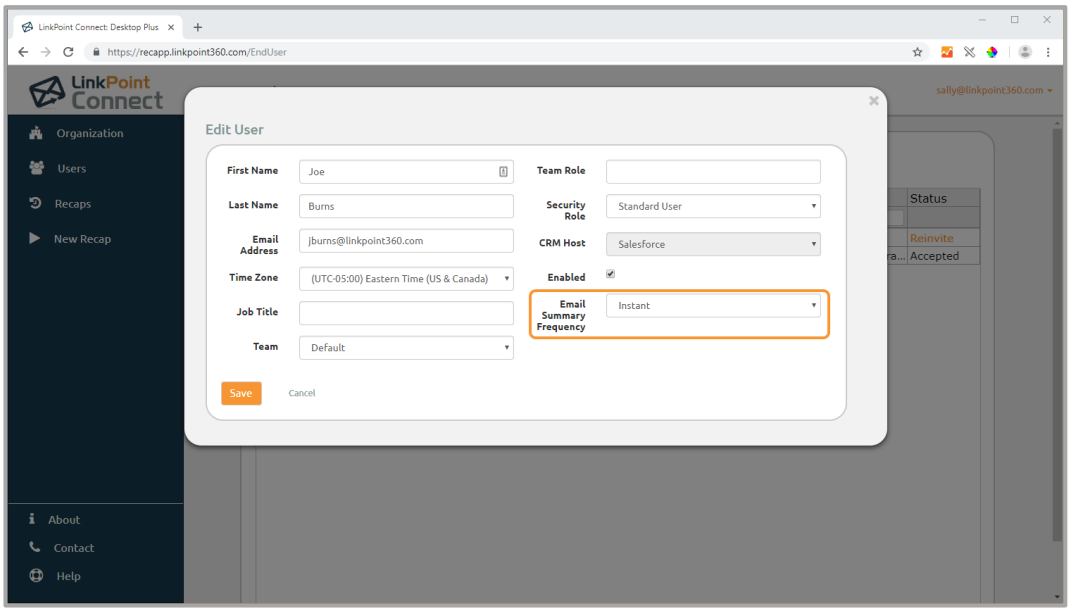
Admin Only: This article outlines some functionality available only to Desktop Plus Admins or Team Administrators. Standard Users can view Meeting Recap Summaries in Salesforce where permissions allow, but they will not receive content via email.

1 Locate the **Meeting Recap Summary** email within your inbox.

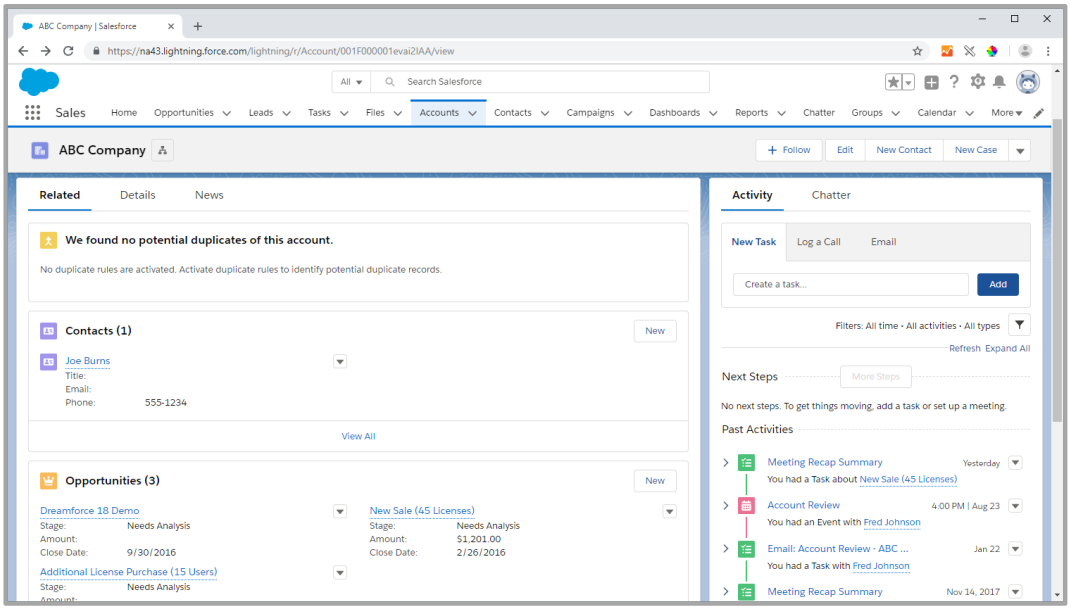


Tip: When a user completes a Meeting Recap, the Summary email is sent to the Organization Administrator(s) and any related Team Administrators. The email content includes all of the questions and answer selections for each time the Meeting Recap is completed or updated.

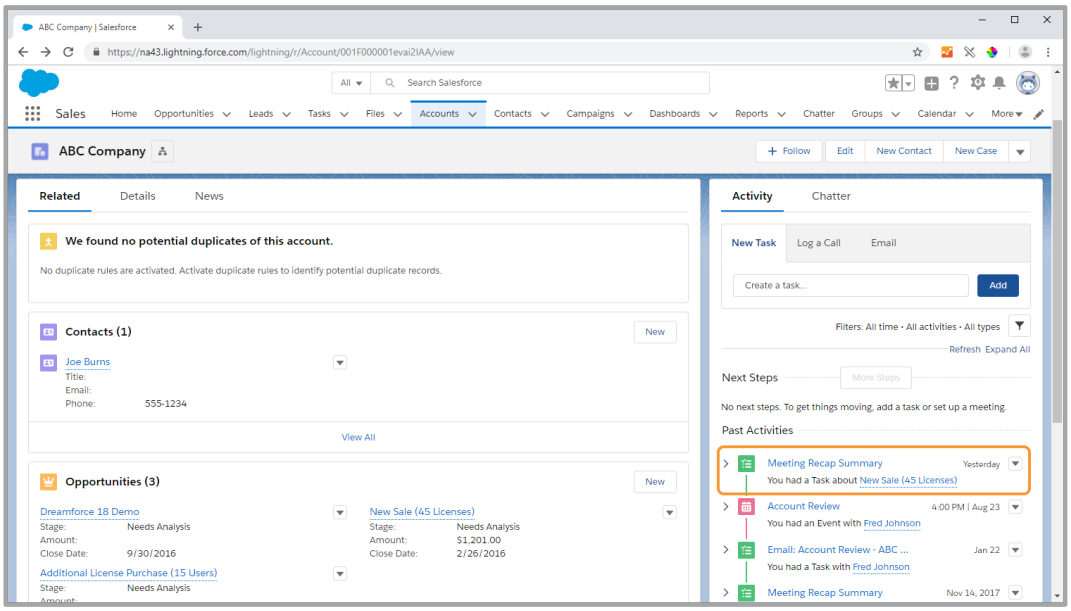
Tip: Email notifications are on by default; however, Organization Administrators and Team Administrators can change their preferences and disable email notifications. This field will not be available to Standard Users.



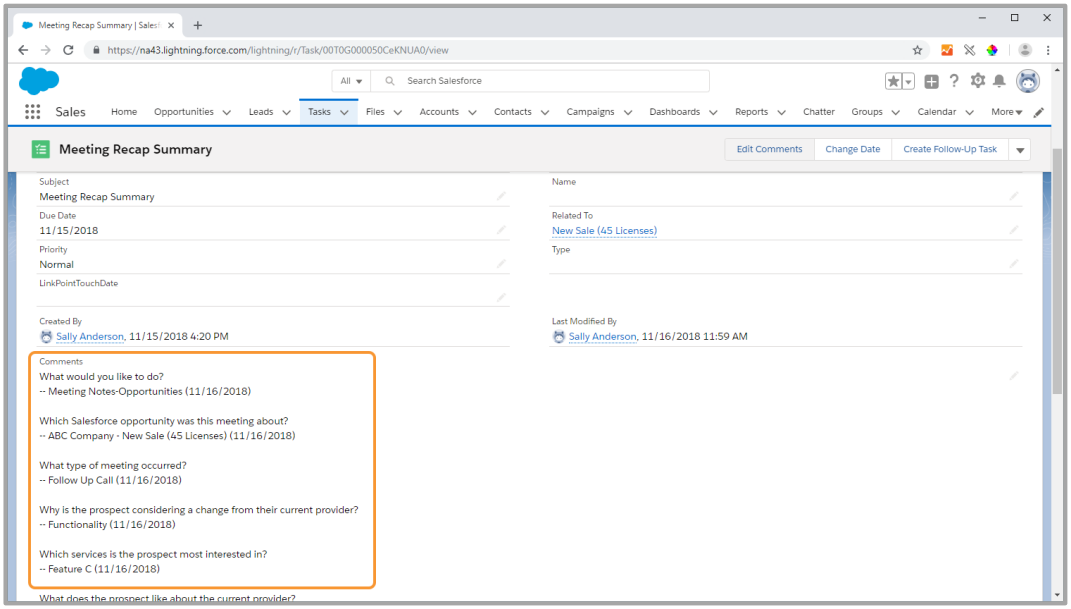
2 Launch **Salesforce** and navigate to a record for which you or your team member has recently completed Meeting Recap (i.e. Opportunity, Account, Case).



3 Locate the **Activity** section on the Salesforce record. When a Meeting Recap is completed, the Meeting Recap Summary is added to the history for the record as Past Activity.

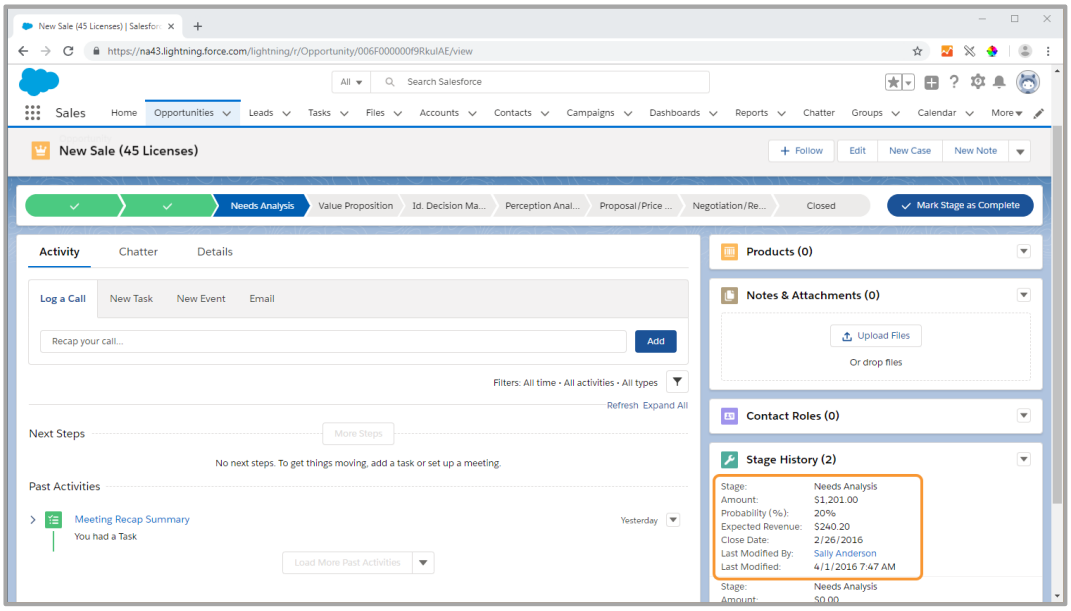


4 Open the **Task** to review the Meetingn Recap Summary. Note that questions and answers are displayed, along with the date that the information was submitted.



Tip: If more than one user in your organization completes a Meeting Recap for the same Salesforce record, multiple Meeting Recap Summaries will be listed in the Activity History.

5 Return to the Salesforce record related to the Meeting Recap. Note that if your configuration includes direct updates to specific Salesforce fields, they will be updated with the information provided in the Meeting Recap.



Tip: This will vary for each organization, but examples of typical fields for direct update include Opportunity Stage or Close Date.