

Recording Emails to Salesforce: Quick Start Guide

LinkPoint Connect: Desktop Edition

Recording Emails to Salesforce

Recording emails directly to Salesforce from the email client reduces time spent logging interactions to Salesforce while ensuring accurate data capture.

1. Create a new outbound email and then click **Send and Record**.
2. Select the Contact or Lead record to record the email to in Salesforce.
3. Select any additional Salesforce objects including Accounts, Cases, or Opportunities in the **Related** list to record to.
4. Search and add any additional records. Then click **Record Now** to send the email and record it to Salesforce automatically.

Get more out of Desktop Edition...

We want you to use LinkPoint Connect: Desktop Edition to its full potential. Here are some handy resources to help you along the way.

- [Recording Emails to Salesforce](#): Record emails to Salesforce without the hassle of copy and paste.
- [Searchable Knowledge Base](#): Detailed articles for each LinkPoint Connect function
- [Video Library](#): Guided tutorials of specific Cloud Edition features including Set Up and Sync
- [LinkPointers Webinars](#): Live demonstrations on various topics with audience Q&A

Need something else? We're here to support you.

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