LinkPoint Connect: Desktop Edition User Guide

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. 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.

A Note about Software Upgrades

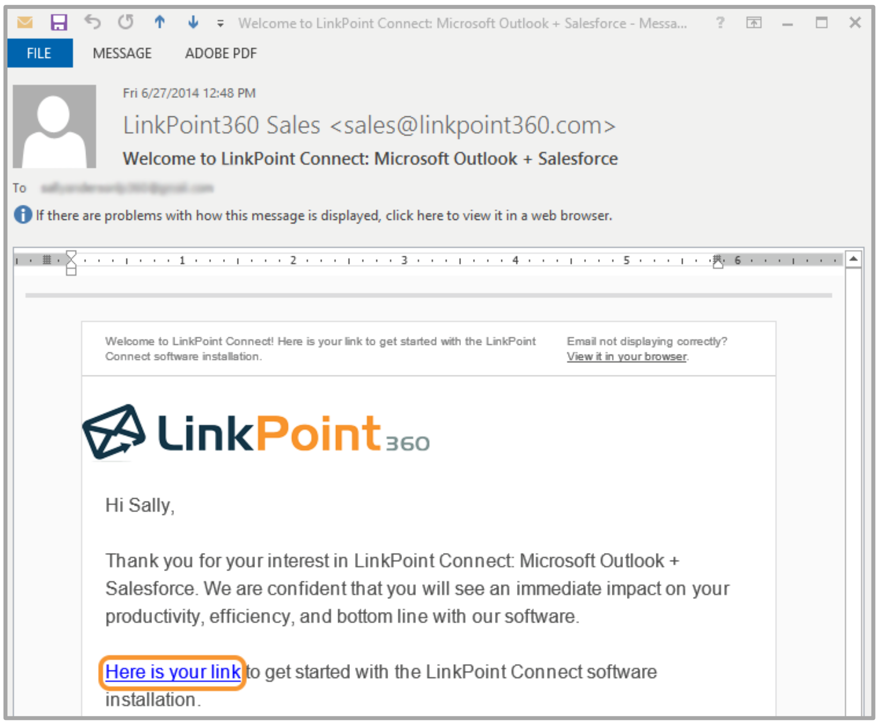
Products and services provided by LinkPoint360 are automatically updated by default. Individual users may, in most cases, change their update preferences within LinkPoint Assist. Some organizations may request that upgrades be disabled by default and then manually released at the discretion of internal 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.

Installing LinkPoint Connect

Installing LinkPoint Connect

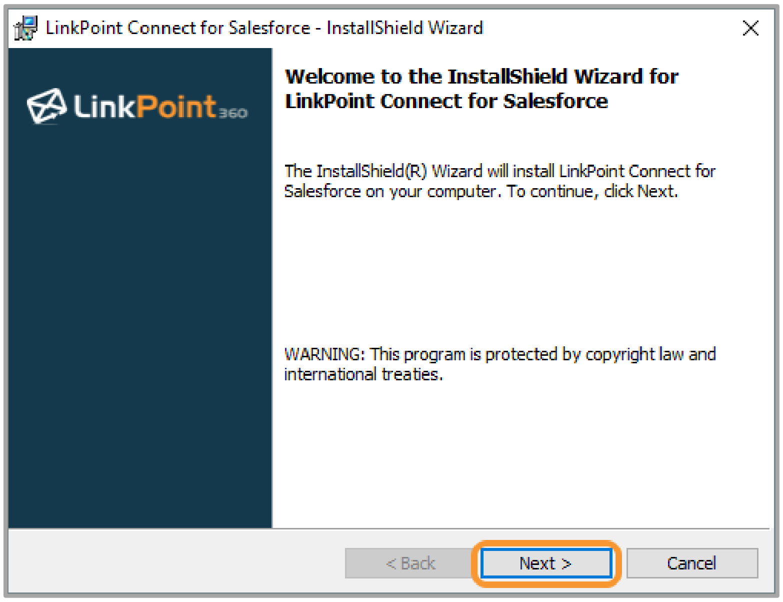
LinkPoint Connect: Desktop Edition is a PC-installed application that allows users to work with and create Salesforce data directly within Microsoft Outlook. To get started, users must download the LinkPoint Connect Installer, which is accessible via the Salesforce AppExchange, the LinkPoint360 website, or a direct link provided by a LinkPoint360 Account Executive. All methods provide access to the same Installer for free trial and licensed users. In this section, you will learn how to install the LinkPoint Connect software.

1. Select the link for the LinkPoint Connect installer provided in the welcome email, or enter the URL in your browser address bar and press enter.



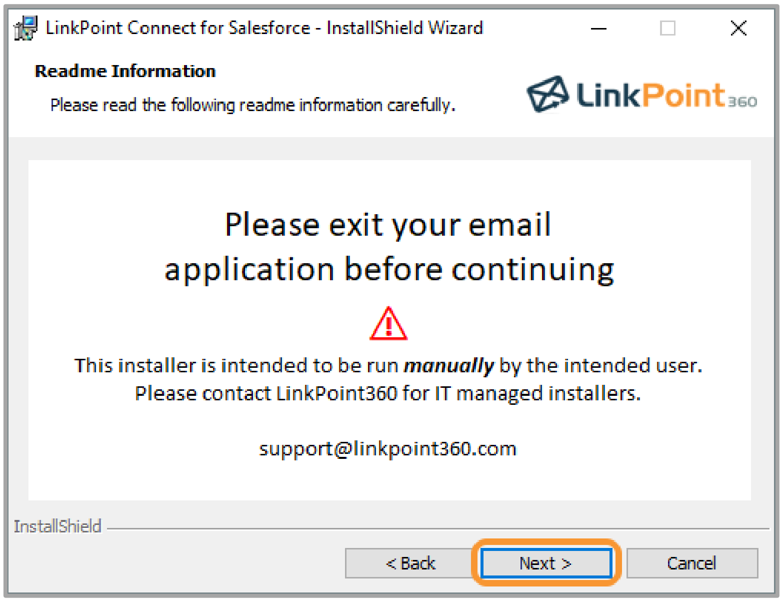
2. Save the file named **LinkPointConnectSF.exe** to your computer and then open it to launch the Installer.

3 Click **Next** within the **LinkPoint Connect for Salesforce – InstallShield Wizard** to start the installation process.

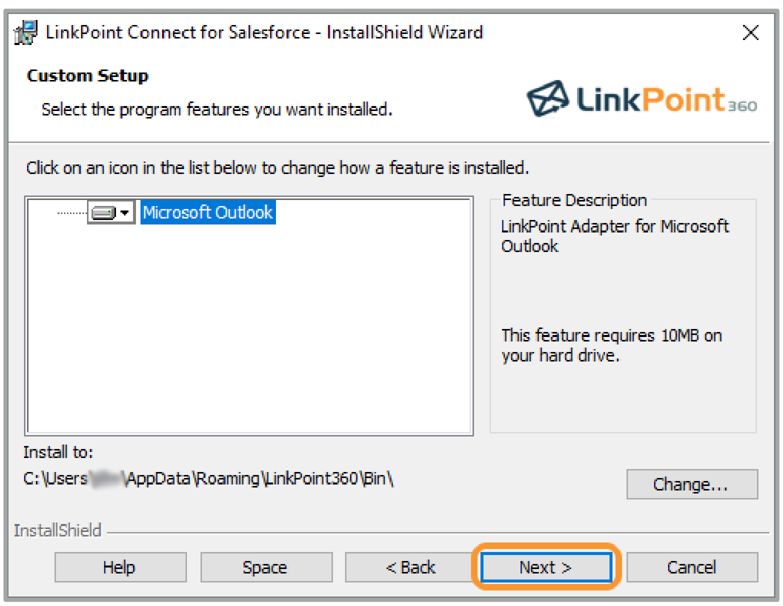


4 Select the **I accept the terms in the license agreement** option, and then click the **Next** button to proceed.

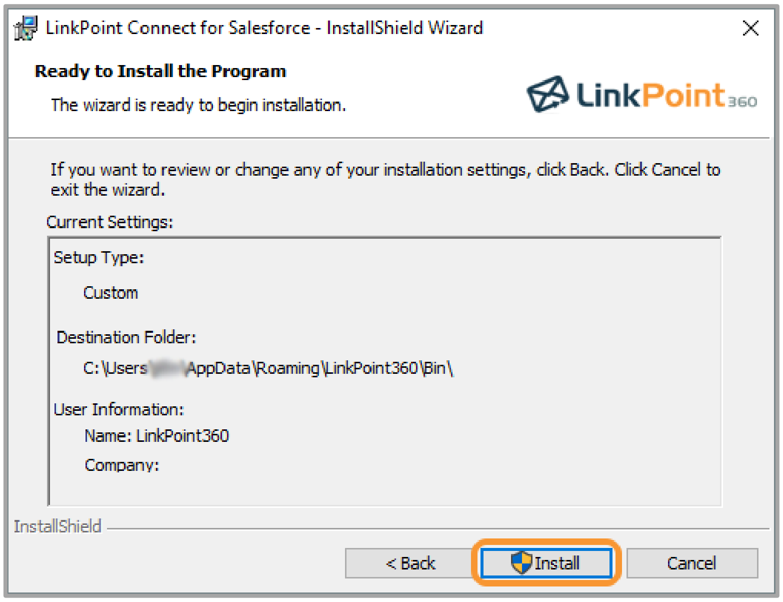
5 Confirm that Microsoft Outlook is closed and click the **Next** button.



6 Select the installation preferences within the Custom Setup screen. By default, the Installer will place the LinkPoint Connect software on the system hard drive. Click **Next** to continue.

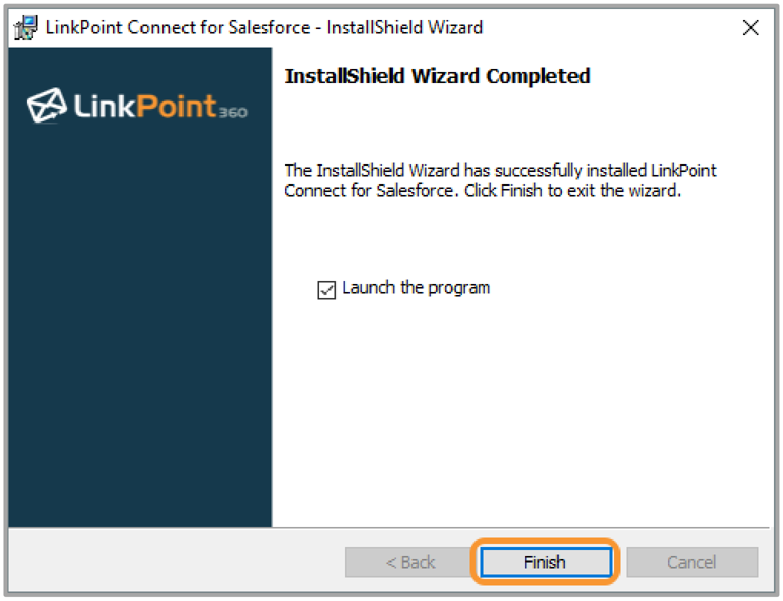


7 Review the **Current Settings**. Then, click **Back** to make changes or click **Install** to start the installation.



Tip: LinkPoint Connect relies on a common Microsoft technology called **.NET Framework 4 Client Profile** which comes pre-loaded on Windows 7 and above. If your computer does not already have this installed, it will automatically be downloaded as part of the LinkPoint Connect installation process.

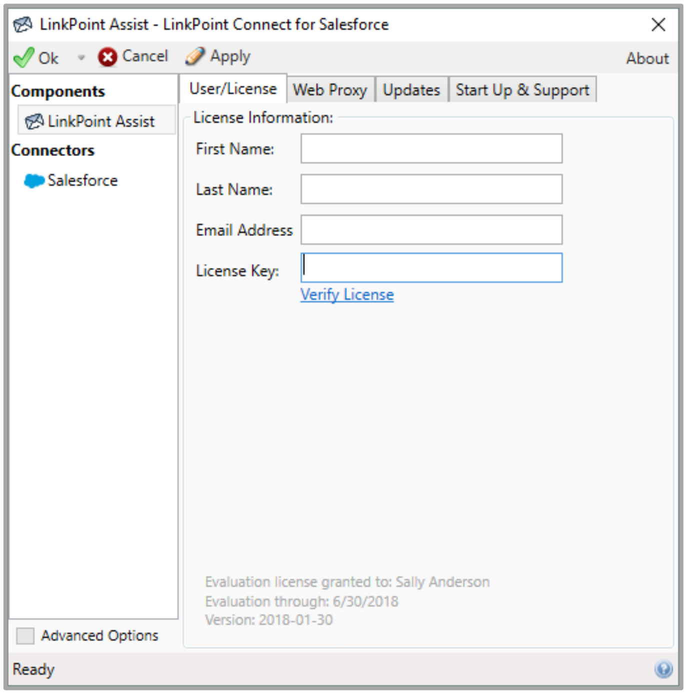
8 With the **Launch the program** checkbox selected, click the **Finish** button to exit the Installer.



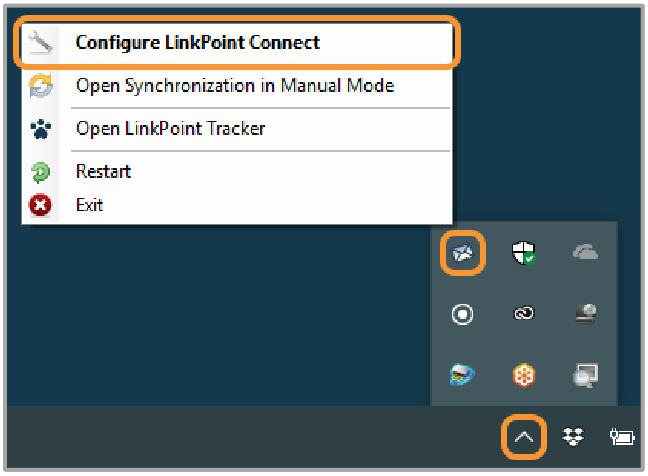
Entering a License Key

LinkPoint Connect: Desktop Edition is a PC-installed application that allows users to work with and create Salesforce data directly within Microsoft Outlook. To use LinkPoint Connect beyond the initial free trial period, users must enter their unique License Key. In this section, you will learn how to enter your LinkPoint Connect License Key.

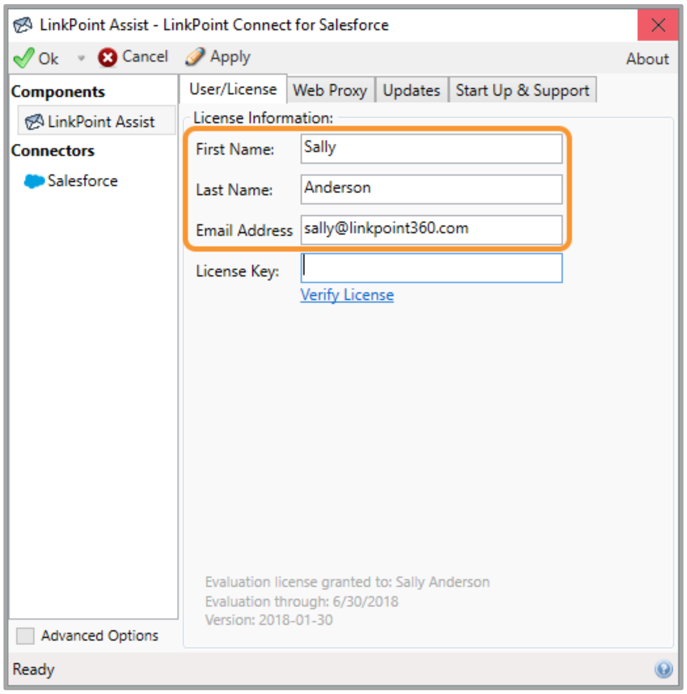
1. Launch the **LinkPoint Assist** window.



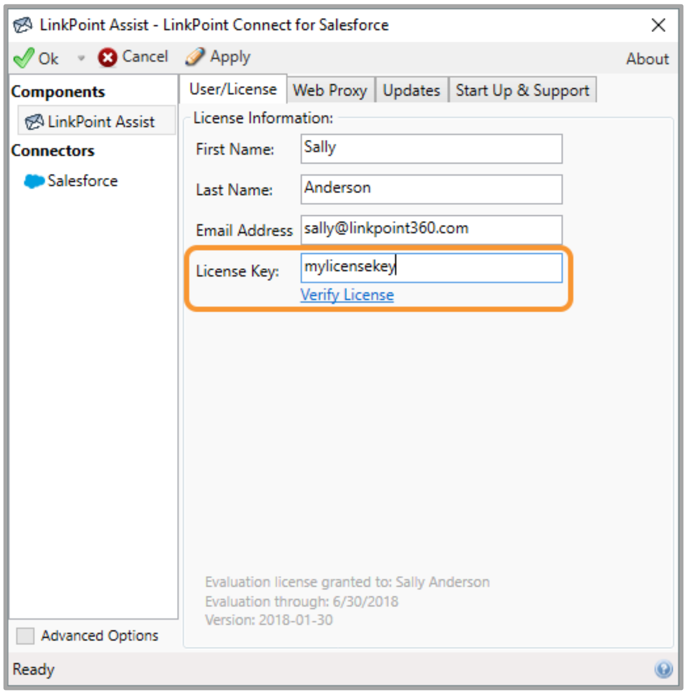
Tip: You may automatically arrive within LinkPoint Assist by checking the option to **Launch the program** when finishing the installer. You can also access these settings by right clicking the **LinkPoint Assist** icon in the system tray near your desktop clock and then selecting **Configure LinkPoint Connect**.



2 Enter the required information for the **First Name**, **Last Name**, and **Email Address** fields.



3 Enter the **License Key** provided in the welcome email, and click **Verify License**.

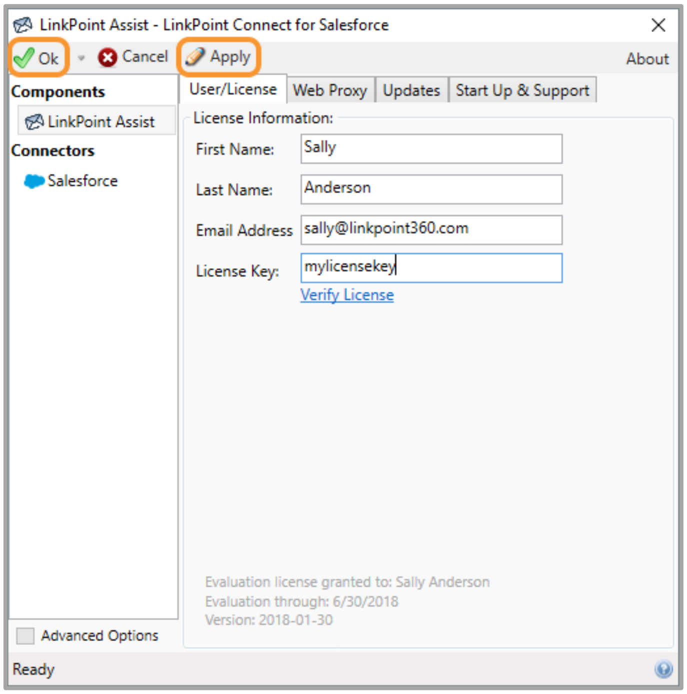


Tip: If you are installing LinkPoint Connect as part of the free trial, the License Key will be **Evaluation**. This field may be already be populated for you.

Warning: If you have purchased LinkPoint Connect after participating in the free trial, you will need to follow the steps to update your License Key from Evaluation to the License Key provided in your welcome email.

Tip: If you enter your unique license key but the field reverts back to an Evaluation license key, your firewall may be blocking access to the LinkPoint Connect server or there may be an issue with the proxy settings. Please contact your internal IT team for assistance.

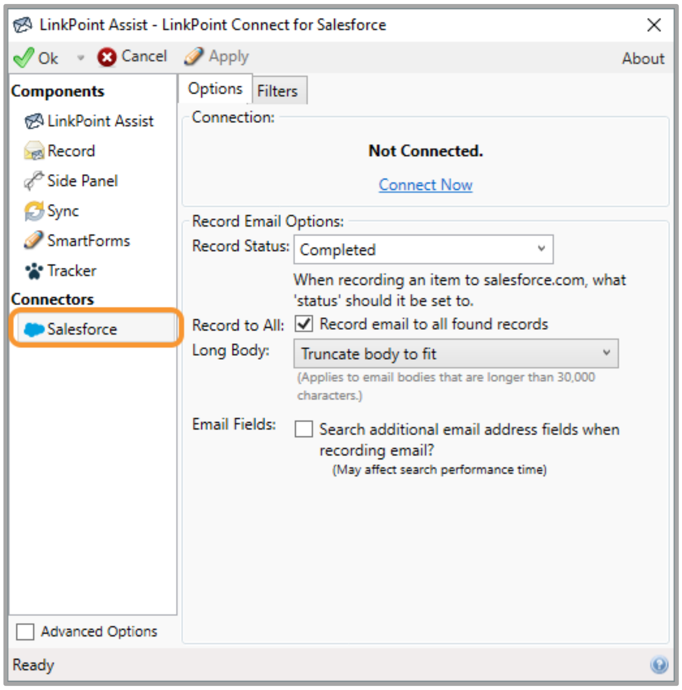
4 Click **Apply** and then click **Ok** to save the changes.



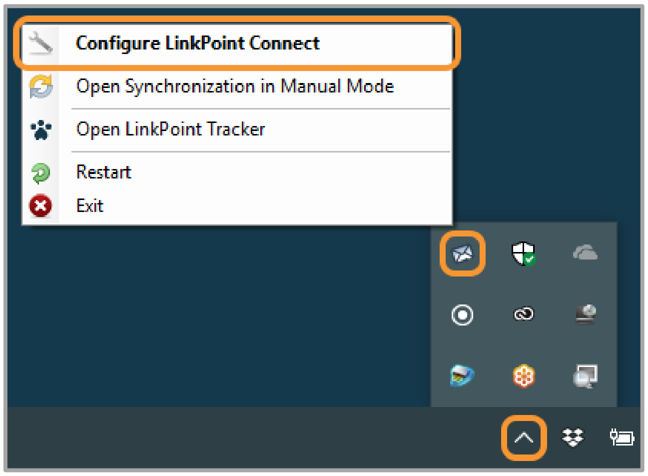
Connecting LinkPoint Connect to Salesforce

LinkPoint Connect: Desktop Edition is a PC-installed application that allows users to work with and create Salesforce data directly within Microsoft Outlook. To get started, users must connect to their Salesforce account within the LinkPoint Connect application. In this section, you will learn how to connect your Salesforce account to LinkPoint Connect.

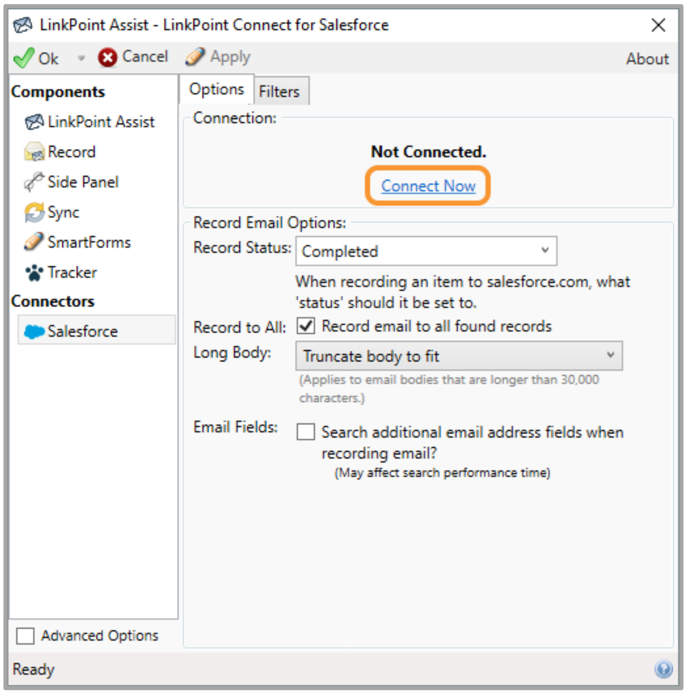
1 Launch the **LinkPoint Assist** window, and select **Salesforce** from the left-hand menu.



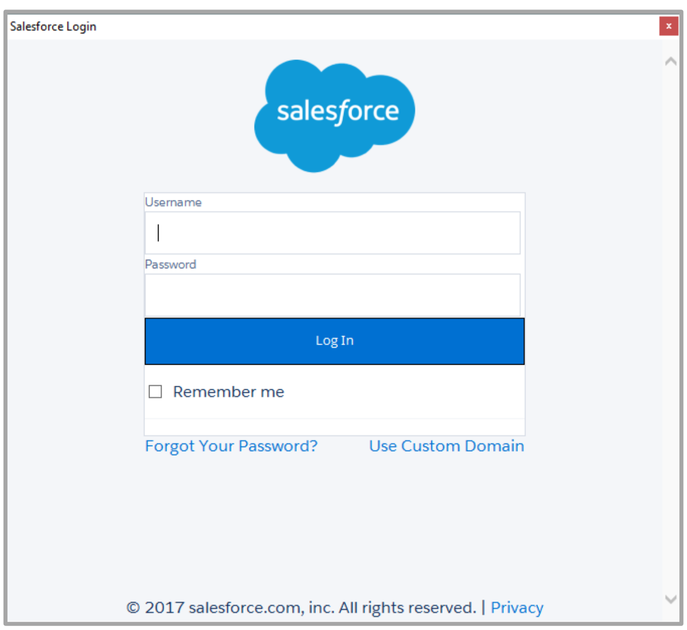
Tip: You may automatically arrive within LinkPoint Assist by checking the option to **Launch the program** when finishing the installer. You can also access these settings by right clicking the **LinkPoint Assist** icon in the system tray near your desktop clock and then selecting **Configure LinkPoint Connect**.



2 Select **Connect Now** to configure LinkPoint Connect for Salesforce.

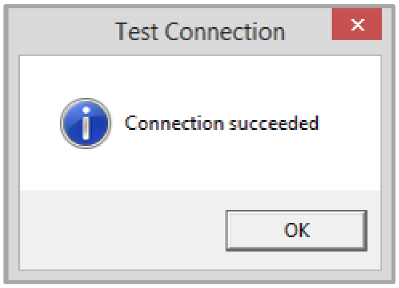


3 Enter your Salesforce **User Name** and **Password**, and click the **Log in to Salesforce** button.



Tip: First-time users may need to click **Allow** to enable LinkPoint Connect to access your Salesforce account and display your Salesforce information in Microsoft Outlook.

4 LinkPoint Connect will test the connection to Salesforce. This may take a few moments. Click **OK** once the Test Connection window displays the Connection succeeded message.

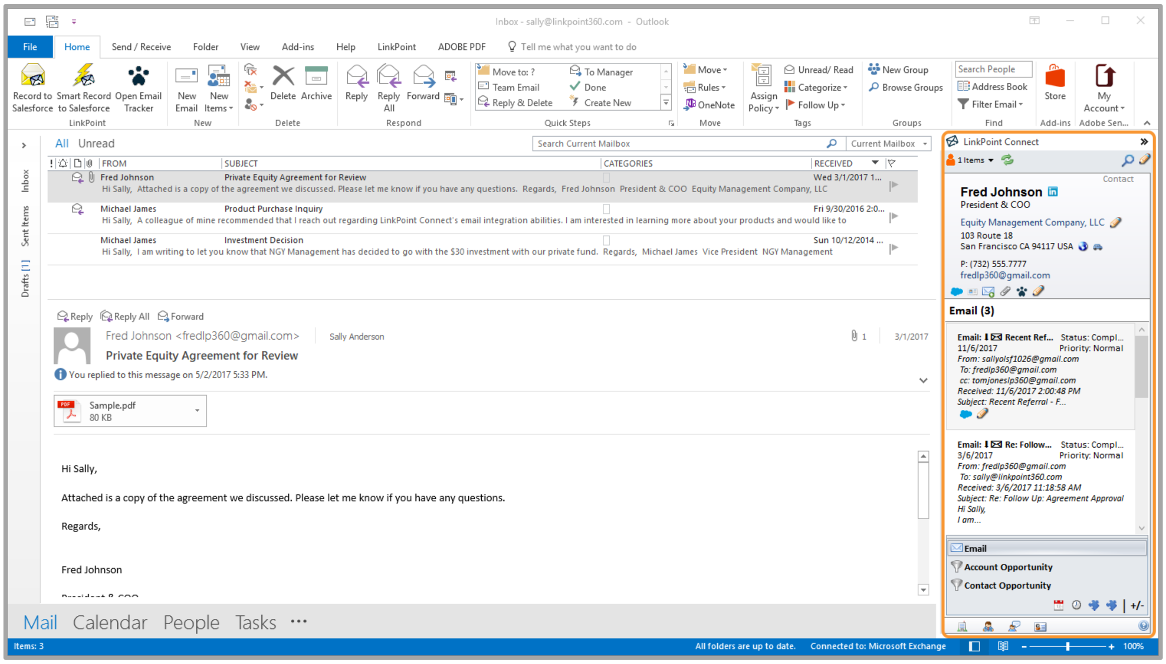


Using the LinkPoint Connect Side Panel in Outlook

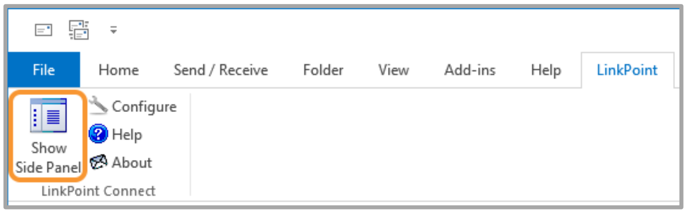
Showing and Hiding the LinkPoint Connect Side Panel

The LinkPoint Connect Side Panel is designed for users to spend the majority of their time working directly within Microsoft Outlook and still see content that is updated in real time from Salesforce. Users can also jump directly to specific records in Salesforce, without the need to search and scroll for information. The Side Panel shows users the specifics about who the contact is, where they left off in the sales or support process, and the interaction that others in the company may have had with the contact. The Side Panel shows Salesforce data and lets users create or edit information dynamically. In this section, you will learn how to show and hide the LinkPoint Connect Side Panel in Outlook.

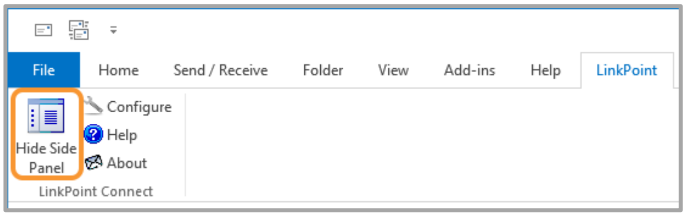
1 Open **Microsoft Outlook**. The LinkPoint Connect Side Panel will appear by default.



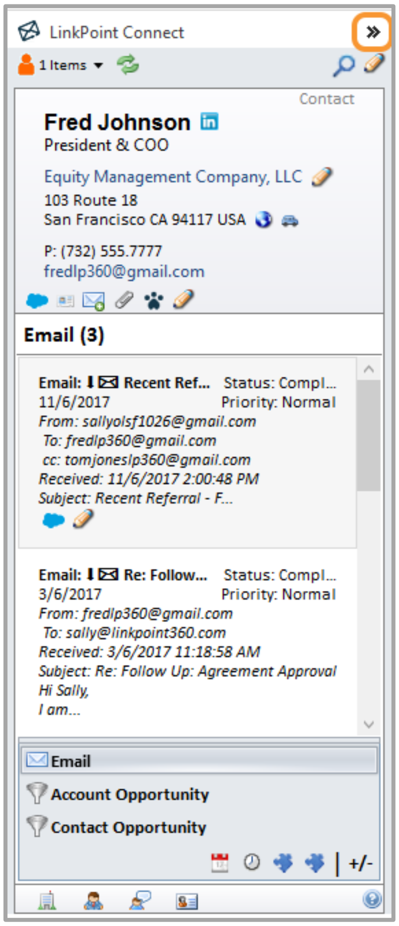
2 Select the **LinkPoint** tab on the Outlook Ribbon, and click the **Show Side Panel** button to enable the Side Panel.



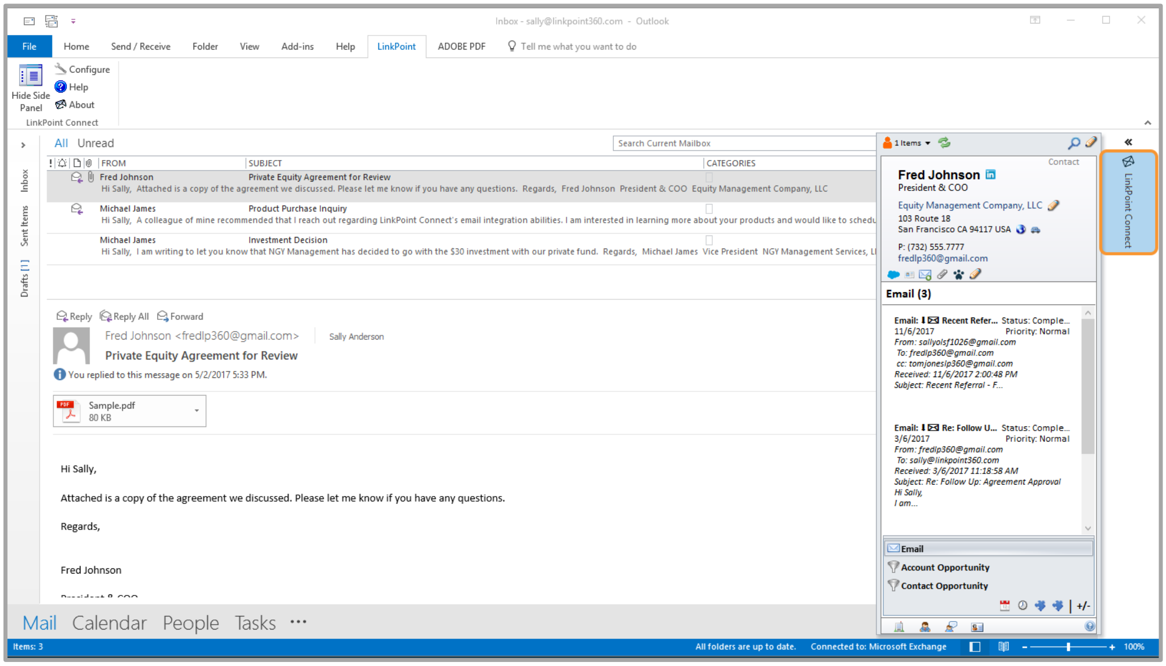
3 Select the **LinkPoint** tab on the Outlook Ribbon, and click the **Hide Side Panel** button to disable the Side Panel.



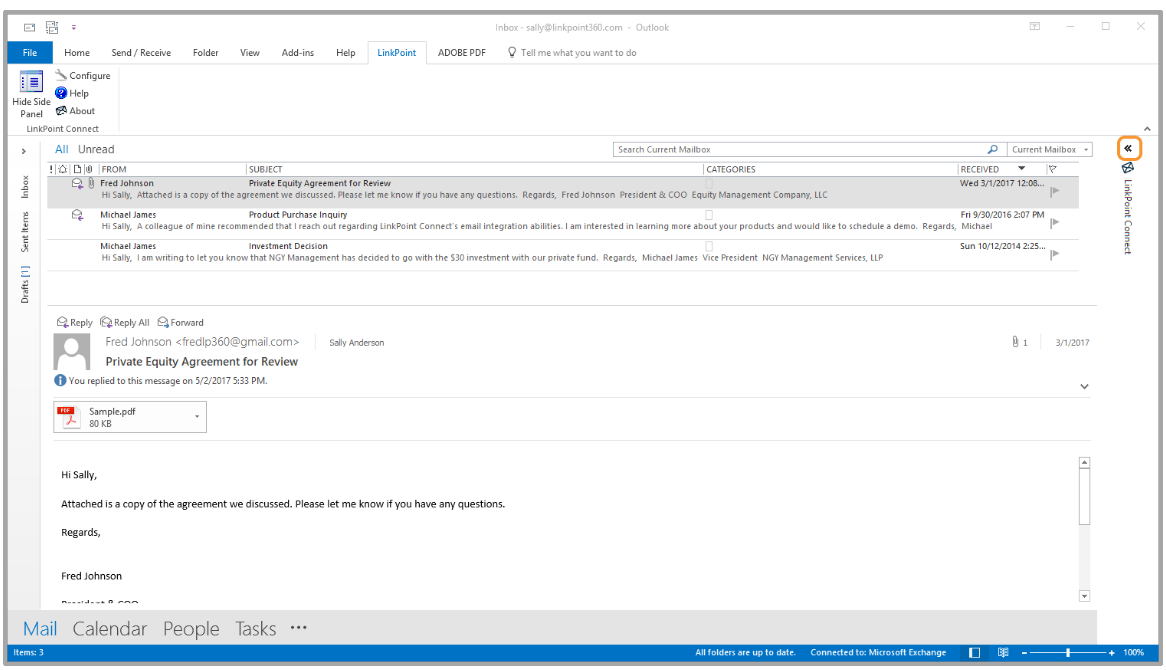
4 Click the **>>** button in the top right corner to collapse the Side Panel.



5 Click the **LinkPoint Connect** button to Quick View the Side Panel. Quick View provides temporary access to the Side Panel, showing information for contacts or leads on the selected email. Click anywhere outside of the Side Panel to hide it again.



6 Click the **<<** button in the top right corner to expand the Side Panel.

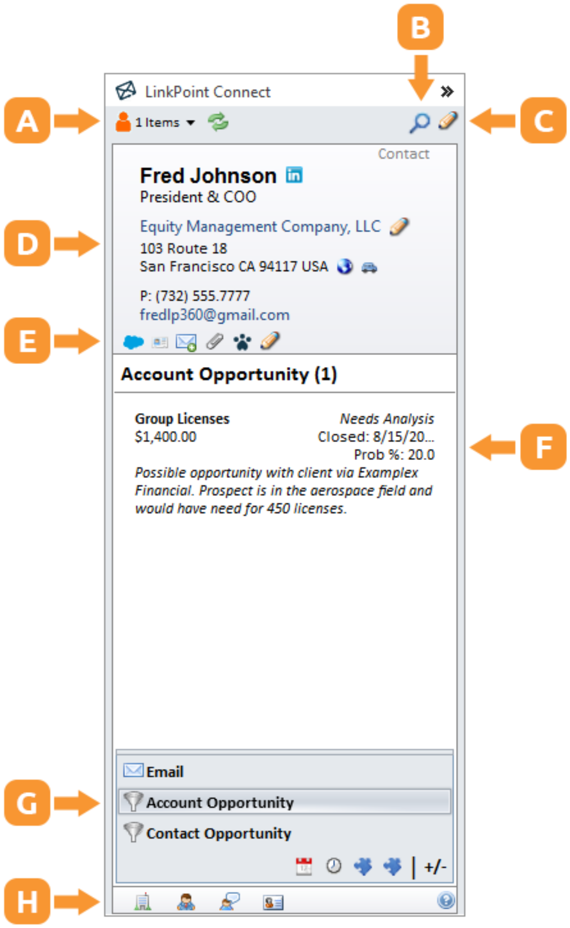


Viewing Salesforce Data in Outlook

The LinkPoint Connect Side Panel enables users to view Salesforce data within Microsoft Outlook. In this section, you will learn about the different information that is accessible within the Side Panel and how to interact with the data.

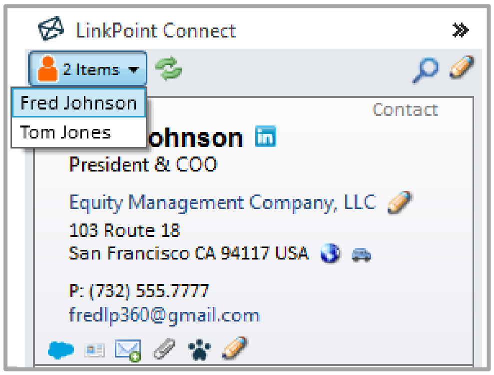
1. Open **Microsoft Outlook**. The LinkPoint Connect Side Panel will automatically display by default. Click on an email, and the Side Panel will populate with data related to the selected email if the email address exists within Salesforce for a Contact or Lead.

2. Explore the sections of the LinkPoint Connect Side Panel.



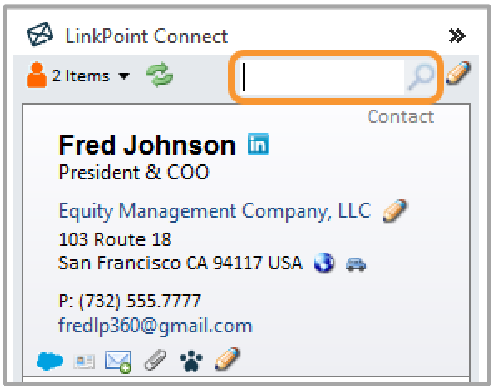
A

Contact List: All Contacts included in the To, From, Cc, and Bcc fields for the selected email are listed. Select one from the list to view the Salesforce information for that record within the Side Panel.



B

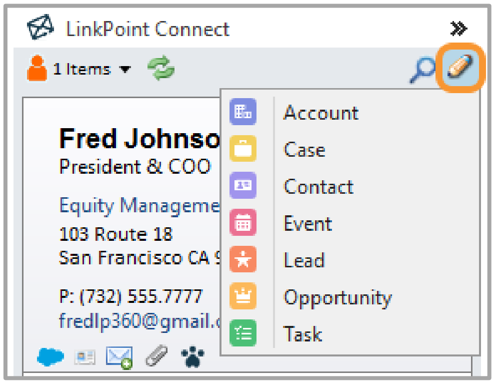
Search: Click the **Search** icon, type the name of any Salesforce Contact, and press **Enter** to view the Salesforce information for that record within the Side Panel.



Tip: If you are looking for a Salesforce Contact but cannot remember the name, try searching for the Account or Opportunity. The Side Panel will return all of the matching Contacts from the search results under the Contact List.

C

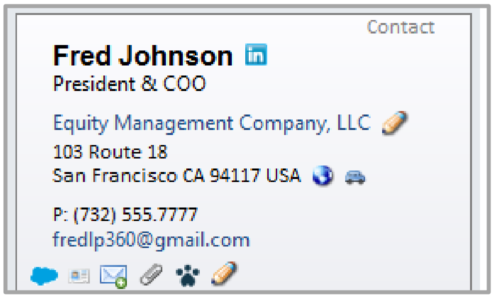
Smart Forms: Create a new Salesforce record from within Outlook. Choose the record you want to create and then complete the form provided.



Additional Resources: Refer to the **Creating and Updating Salesforce Records with Smart Forms** section of this User Guide for more information.

D

Business Card: View basic information related to the Contact such as Name, Job Title, Company, Phone Number, and Email Address.



E

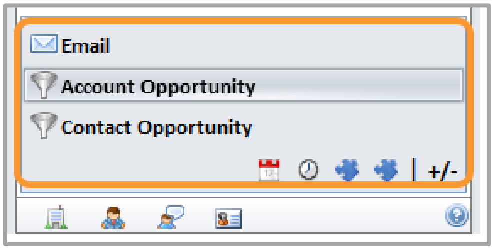
Shortcut Icons: Choose how to act on the data presented in the Side Panel using shortcut icons.

Icon	Action
	Launches a LinkedIn search to display profiles that match the contact's first name, last name, and company
	Opens a Smart Form for the record
	Displays the contact's address in Google Maps
	Displays driving directions
	Opens the record in Salesforce
	Copies the current record to the Outlook address book
	Records the selected email to the contact in Salesforce
	Records attachments to the specific contact in Salesforce
	Launches LinkPoint Tracker history for the contact

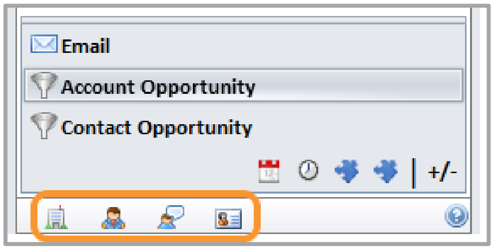
Tip: You can drag and drop attachments from your email or anywhere on your desktop and release the file on the Attachments icon to record the attachment. If you release the attachment over the Attachments icon on the Business Card, the attachment will be recorded to the Contact or Lead record. If you release the attachment over the Attachments icon on an Opportunity or Case record, the attachment will be recorded to the corresponding record in Salesforce.

F **Related Information:** Review data from Salesforce that relates to the selected Lead or Contact. View emails, Accounts, Opportunities, Cases, and custom objects by selecting items in the **Navigation Pane.**

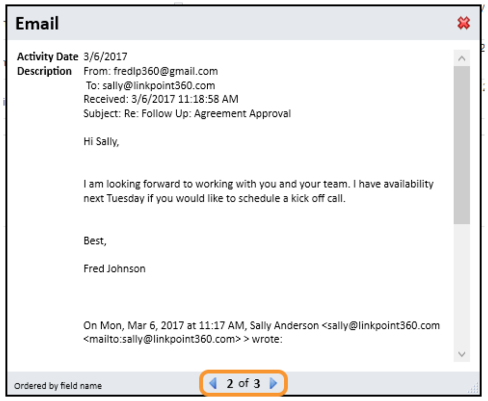
G **Navigation Pane:** Select the Related Information to display for a specific Lead or Contact.



H **Drop Zone:** Create new Accounts, Contacts, or Leads by highlighting an email signature, clicking the selection, and then dragging and dropping the content on one of the icons in the Drop Zone.



3 Double click on items listed within the Related Information section of the Side Panel to preview the Salesforce content within Outlook. Click the arrows to move between Salesforce items.

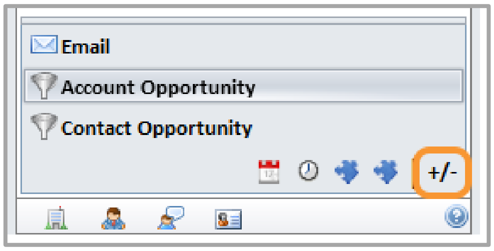


Enabling and Disabling LinkPoint Connect Side Panel Navigation Pane Items

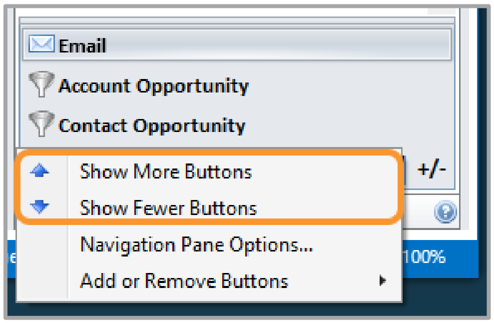
LinkPoint Connect offers users the flexibility to choose the information that is displayed in the Side Panel. In this section, you will learn how to add, remove, and rearrange the content shown in the Side Panel.

Tip: The configuration options mentioned in this section are based on the standard out-of-the-box settings for LinkPoint Connect. If you do not have these settings available, it is possible that they have been disabled by your internal IT admin.

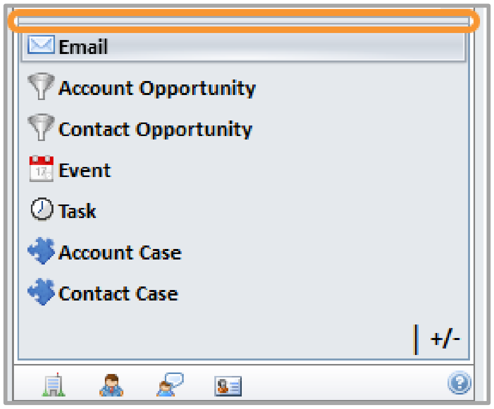
1. Navigate to the Side Panel, and click the **+/-** icon in the bottom right of the **Navigation Pane**.



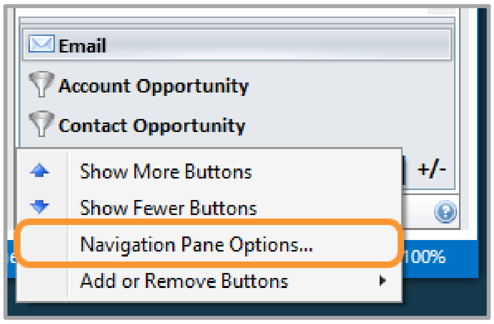
2. Select the option to **Show More Buttons** to add to the list of items available in the Navigation Pane. Select **Show Fewer Buttons** to reduce the number of items available.



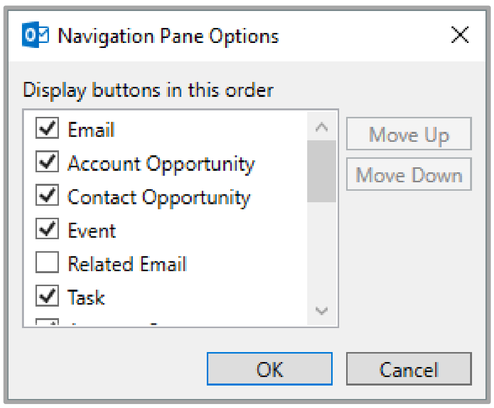
Tip: You can also click and drag the top of the Navigation Pane up or down to increase or decrease the size of the pane. This will automatically show or hide buttons.



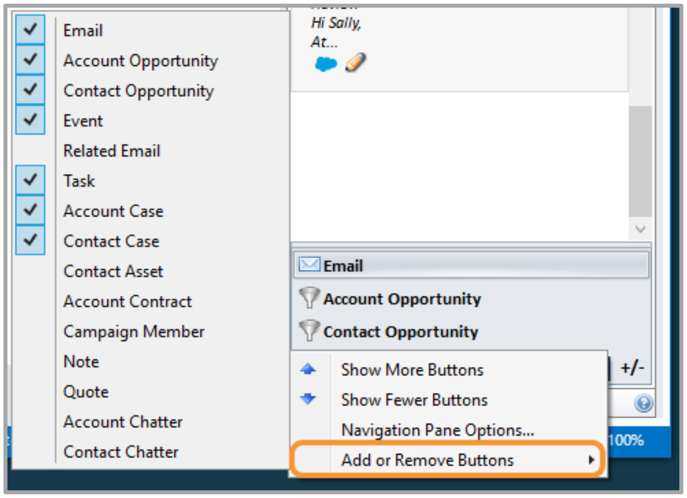
3 Select **Navigation Pane Options…**



4 Choose the items to display in the Navigation Pane by selecting or deselecting the checkboxes in the **Display buttons in this order** list. Select an item and click the **Move Up** and **Move Down** buttons to change the order that the items appear in the Navigation Pane. Click **OK** to save changes or **Cancel** to discard them.



5 Select **Add or Remove Buttons** to see a quick view of available options for the Navigation Pane. Click items with a checkmark to deselect them and remove them from the Navigation Pane. Click items without checkmarks to add them to the Navigation Pane.



Creating Salesforce Records from Microsoft Outlook

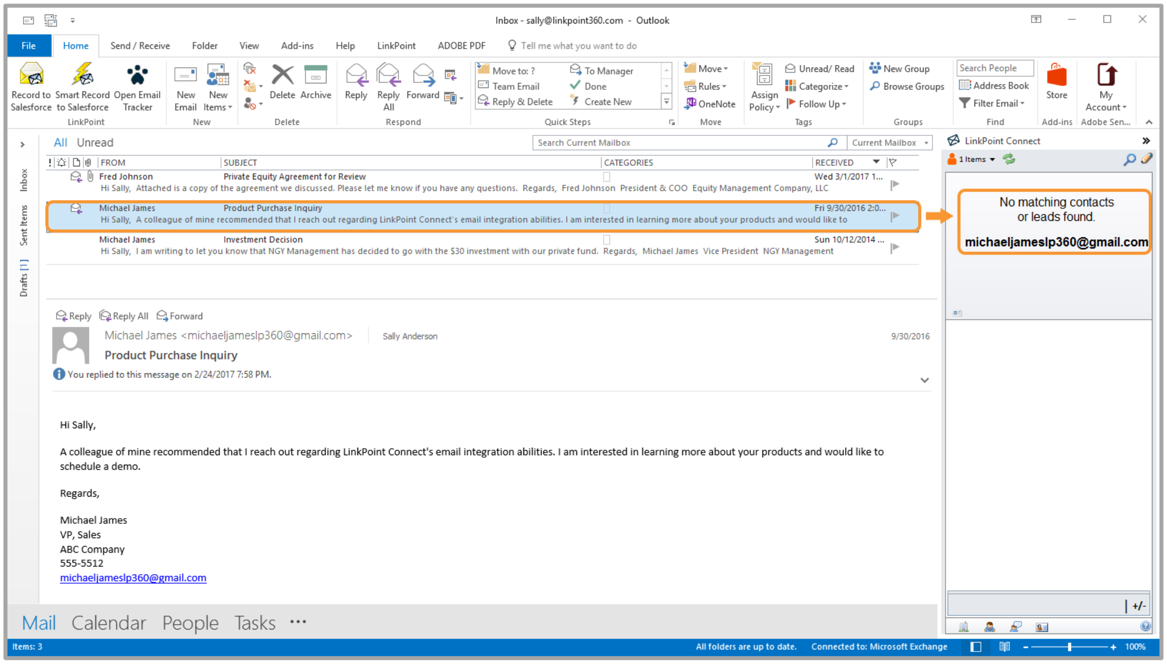
Creating a New Salesforce Contact from Outlook

LinkPoint Connect helps users remain in Outlook while creating new Salesforce records with minimal manual data entry. In this section, you will learn how to create new Salesforce Contacts while remaining in Outlook.

Tip: Depending on how your organization has configured LinkPoint Connect to mirror your existing business processes, users may not have all of the options described in the following section. Contact your internal IT admin for more information.

Example: In this example, we will demonstrate how to create a new Salesforce Contact. The steps are similar for creating new Leads and Accounts.

1 Select an email from a new Contact. Note that the Side Panel searched Salesforce for the Contact and did not find a record matching the sender's email address.



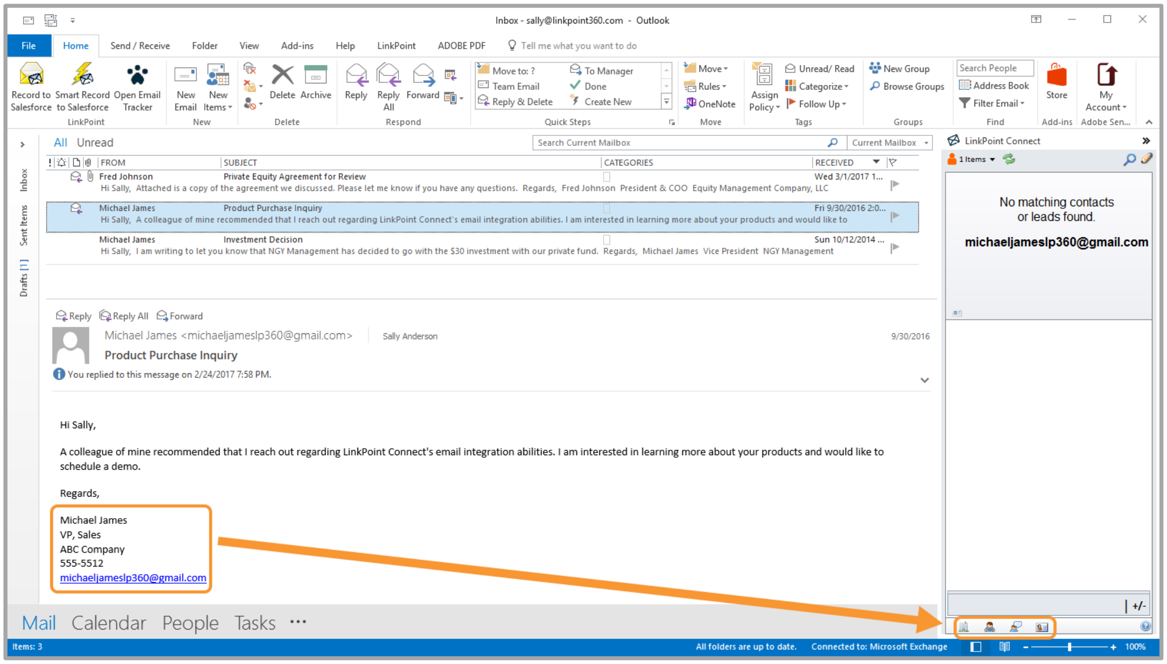
Tip: LinkPoint Connect searches Contacts based on primary email address. If you receive an email from an existing Contact and the Side Panel does not return a matching Contact, it is possible that the Contact may be in Salesforce under a different or secondary email address. You can verify before creating a new Contact by using the Search Bar in the Side Panel to look for the contact by First and/or Last Name.

Additional Resources: Users can enable the option to search based on secondary email address to expand the search results provided in the Side Panel. Refer to the **Searching and Recording Based on Secondary Email Address** section of this User Guide for more information.

Additional Resources: LinkPoint360 can customize the Search Bar to include results from custom fields. Please contact the LinkPoint360 Support Team for more information.

2

Highlight the signature within the email. Drag and drop the highlighted signature to the Drop Zone at the bottom of the Side Panel. Release the selection over the record type you want to create.

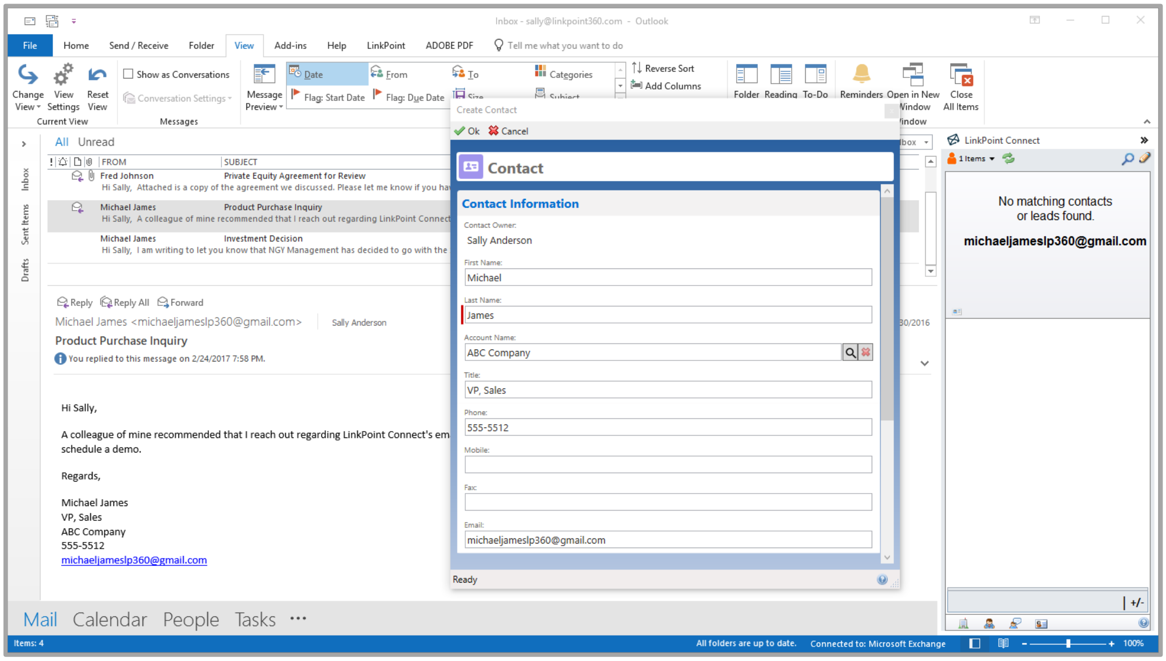


Tip: Users can create new Salesforce Accounts, Contacts, and Leads or Outlook Contacts by releasing the email signature over the corresponding icon in the Drop Zone.

Icon	Action
	Creates a new Account in Salesforce
	Creates a new Contact in Salesforce
	Creates a new Lead in Salesforce
	Creates a new Contact in Outlook

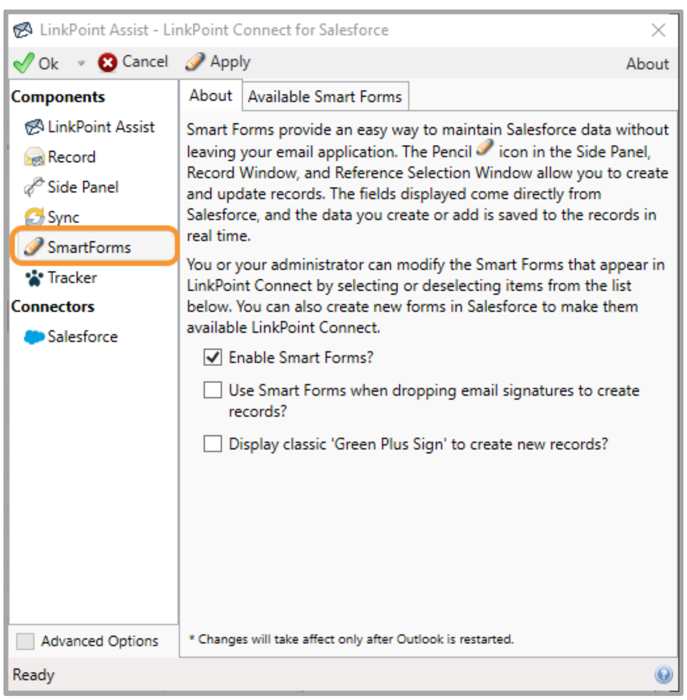
3

Enter any required information in the Smart Form for the selected record type. Note that some fields, such as First Name, are prepopulated based on the contents of the email signature.

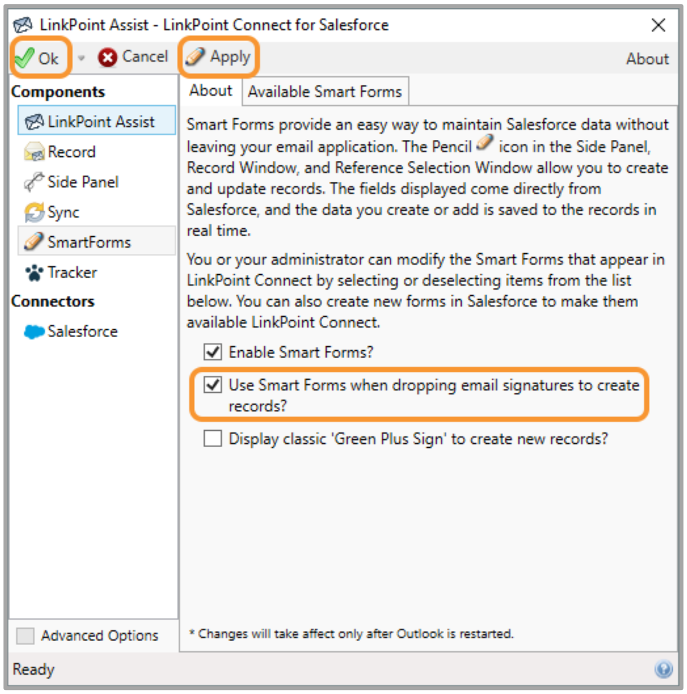


Tip: Existing customers may need to update their configuration to launch Smart Forms with drag and drop. To change whether drag and drop launches new records in Smart Forms or in Salesforce via the web browser:

1. Select **Smart Forms** from the **Components** list on the left side of the **LinkPoint Assist** window.



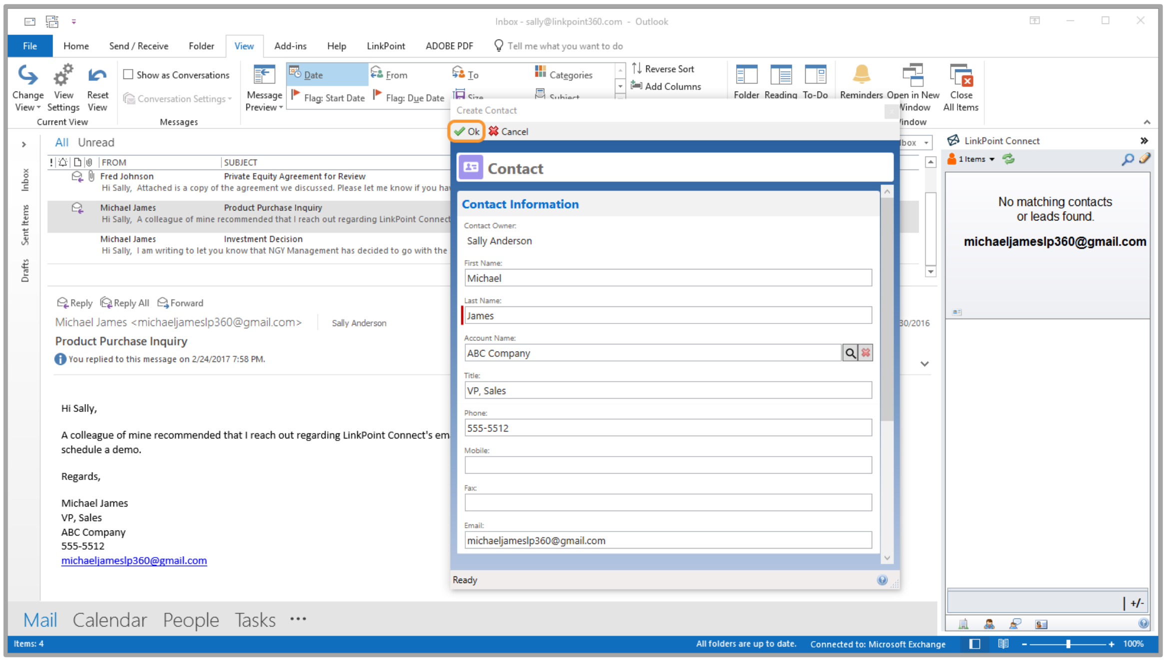
2. Select the checkbox to **Use Smart Forms when dropping email signatures to create records?**. Click **Apply** and **Ok** to finalize the changes.



Additional Resources: Refer to the **Creating and Updated Salesforce Records with Smart Forms** section of this User Guide for more information.

4

Click **OK** to create the record in Salesforce.

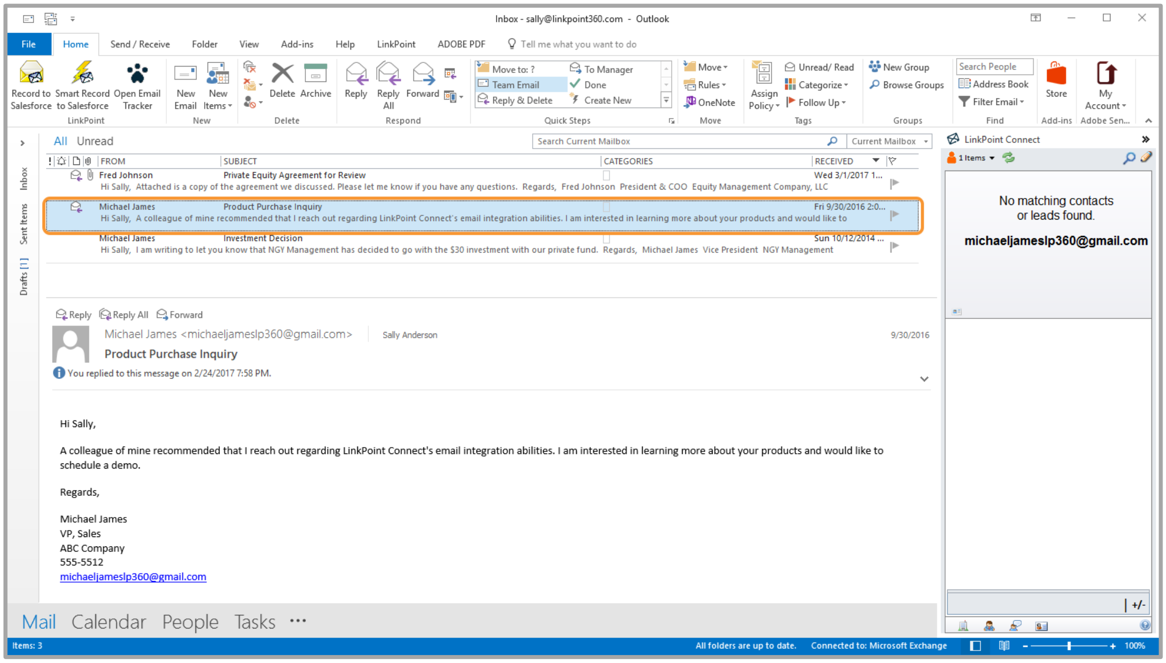


Tip: LinkPoint Connect will not override any business rules within your instance of Salesforce. If additional fields are required to create the Contact, the user will need to enter the information in order to proceed.

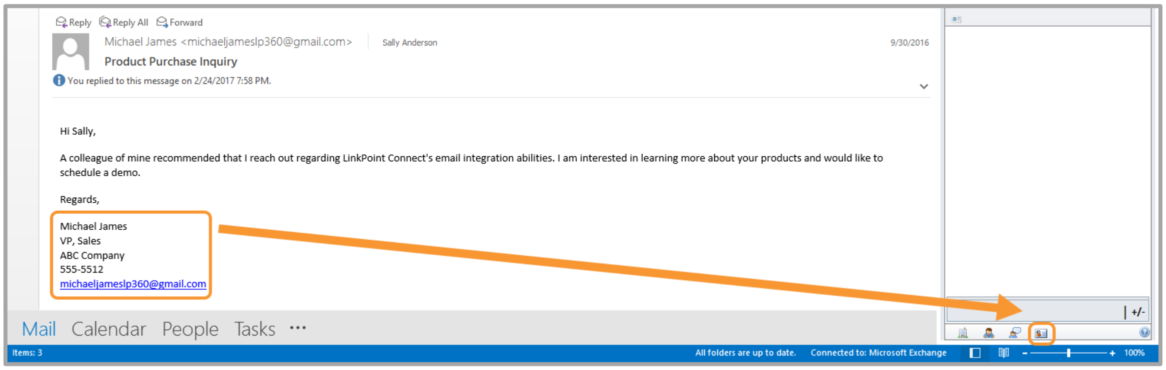
Creating Outlook Contacts from Email Signatures

LinkPoint Connect users can create new Contacts within Outlook for Contacts users refer to but that may not be needed in Salesforce. In this section, you will learn how to create Outlook contacts using LinkPoint Connect.

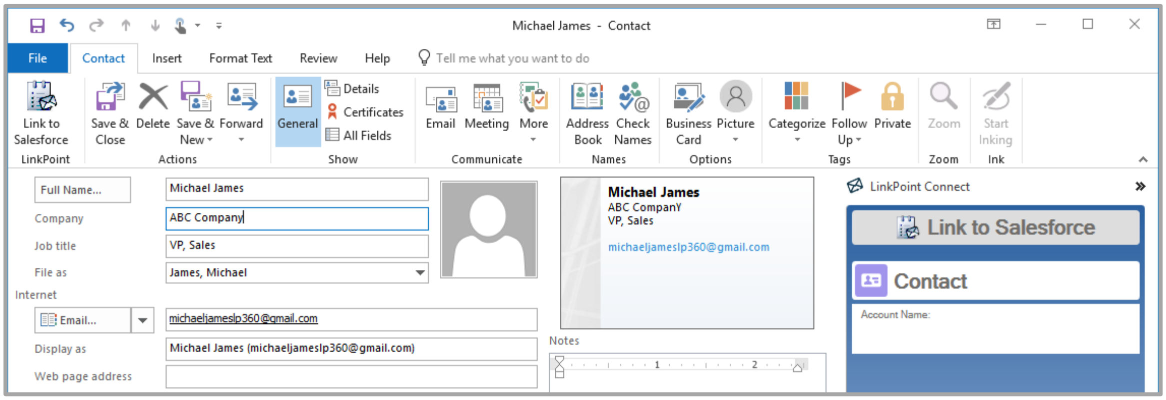
1 Select an email from a Contact you wish to add to Outlook.



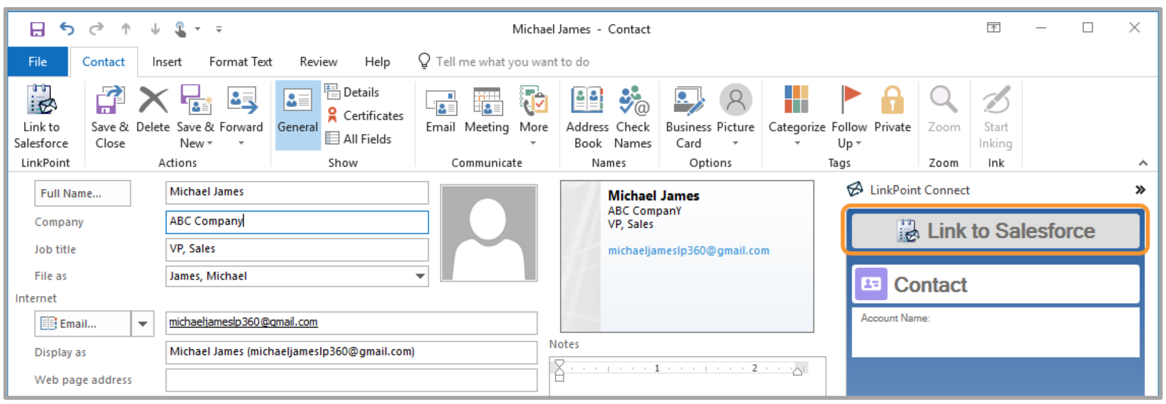
2 Highlight the signature within the email. Drag and drop the highlighted signature to the **Drop Zone** at the bottom of the Side Panel. Release the selection over the icon for **Create a New Outlook Contact**.



3 Review the information on the **Contact** screen within Outlook. Verify the prepopulated information and add any additional details as necessary.



Tip: If you want the Contact to sync to Salesforce, click the **Link to Salesforce** button This will flag the Contact to sync to Salesforce if you have Contact Sync enabled. Leave this selection blank to create the Contact in Outlook only.



Additional Resources: Refer to the **Syncing Contacts Between Outlook and Salesforce with Manual Sync** section of this User Guide for more information.

4 Finish editing the contact information and then click the **Save & Close** button to create the contact.

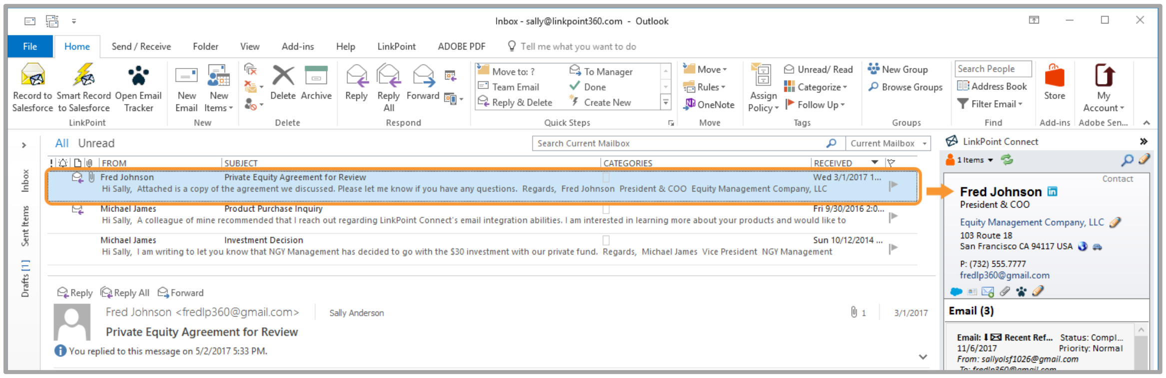
Using Active Update to Edit Contacts in Salesforce

LinkPoint Connect users can update existing Contacts in Salesforce from within Outlook. As users receive communication from Contacts, they can easily identify any new information and choose the details to update or keep. Active Update also works as a duplicate checker, identifying when matching Contacts already exist and prompting users to choose whether to intentionally create a new record rather than updating an existing one. In this section, you will learn how to update Salesforce Contacts using Active Update.

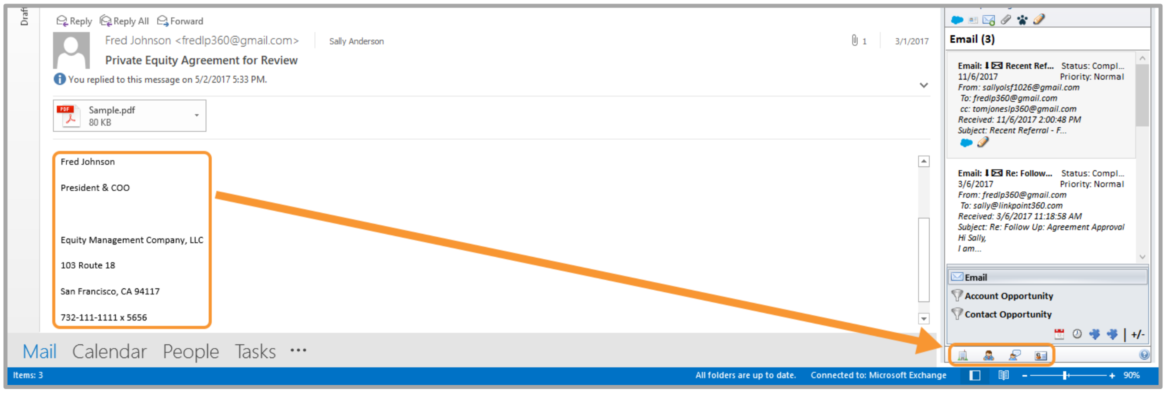
Tip: Depending on how your organization has configured LinkPoint Connect to mirror your existing business processes, users may not have all of the options described in the following section. Contact your internal IT admin for more information.

Example: In this example, we will demonstrate how to update a Salesforce Contact. The steps are similar for updating Leads and Accounts.

1 Select an email from an existing Contact. Note that the Side Panel searched Salesforce and found a matching record based on the sender's email address.



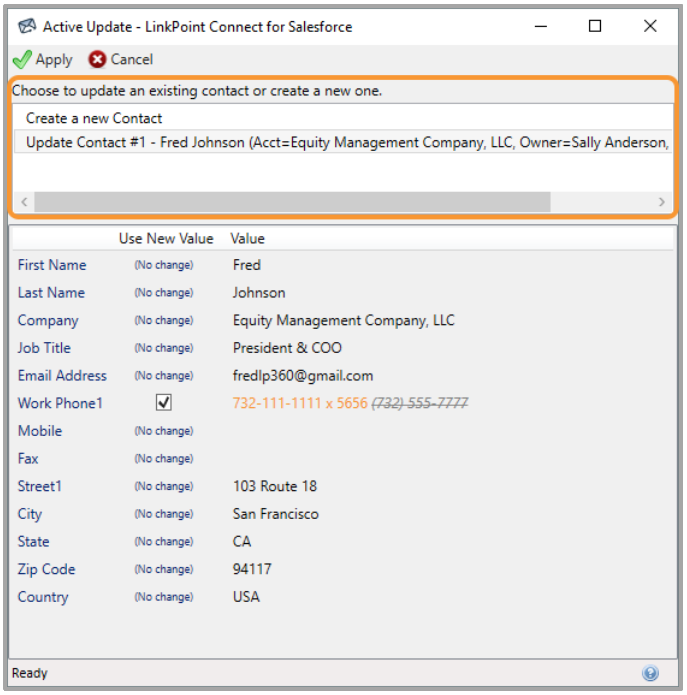
2 Highlight the signature within the email. Drag and drop the highlighted signature to the **Drop Zone** at the bottom of the Side Panel. Release the selection over the record type you want to update.



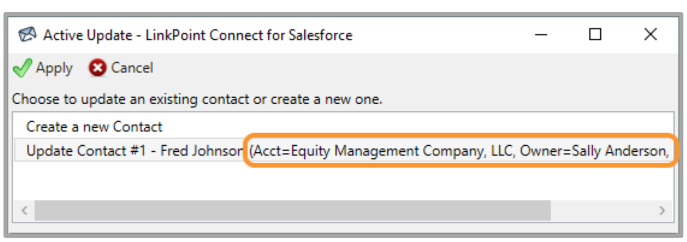
Tip: Users can update Salesforce Accounts, Contacts, and Leads or Outlook Only Contacts by releasing the email signature over the corresponding icon in the Drop Zone.

Icon	Action
	Creates a new Account in Salesforce
	Creates a new Contact in Salesforce
	Creates a new Lead in Salesforce
	Creates a new Contact in Outlook

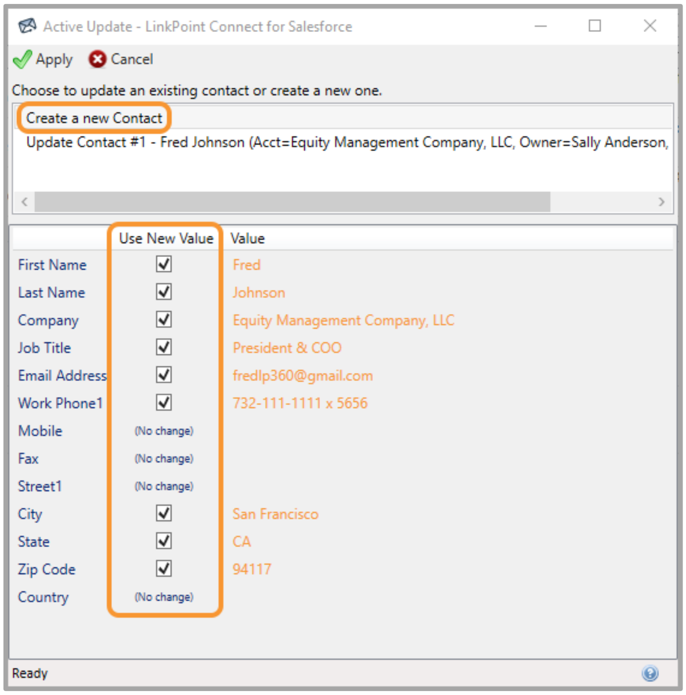
3 Review the Contact information in the **Active Update** window. LinkPoint Connect will search Salesforce, identify matching records, and list the records in the top portion of the window.



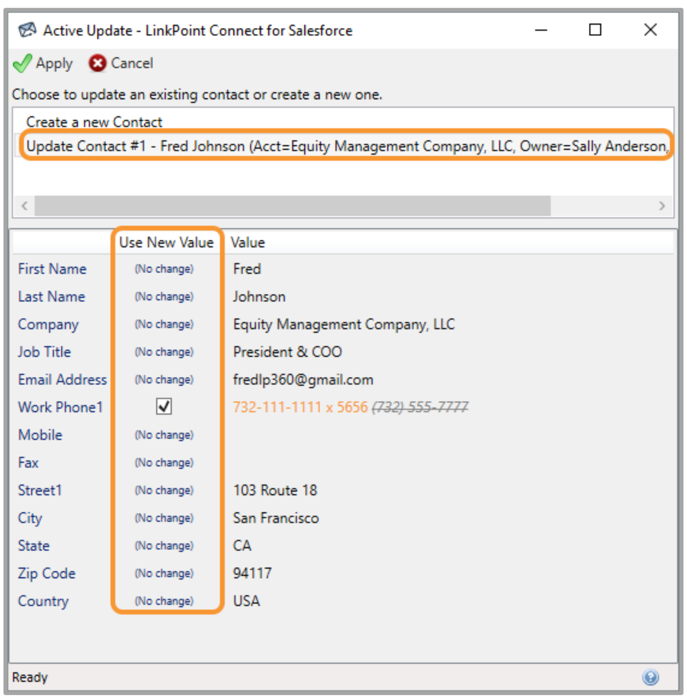
Tip: You can review some record details, such as the Account and Owner, in the information next to the Contact confirm that you are working with the correct record before making any changes.



4a Select **Create a new Contact** to create a new Salesforce record. Confirm the information to include in the new Contact record by selecting or deselecting the checkboxes for each information field.



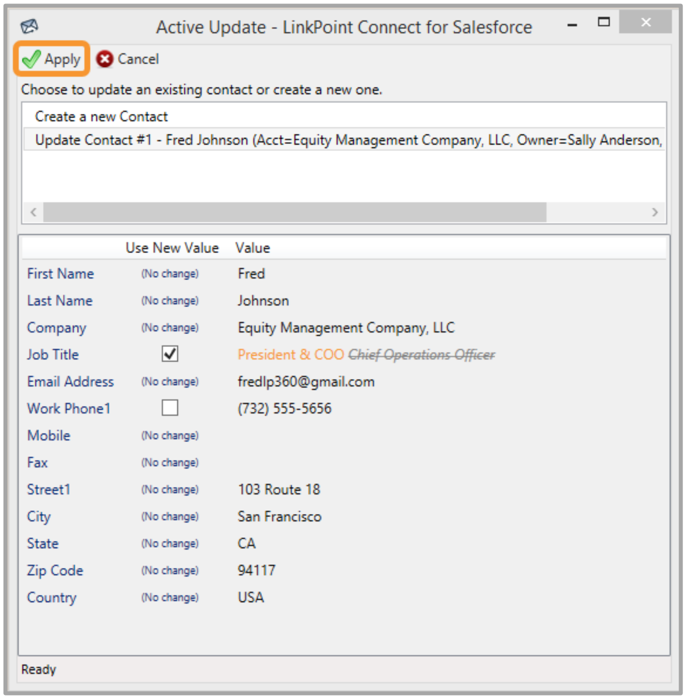
4b Select a Contact to update from the list. Select a checkbox for a field to overwrite the existing Salesforce record with the new information for that field. Deselect a checkbox to keep the existing value in Salesforce.



Tip: Active Update will display the record fields on the left and the existing field values as they appear currently in Salesforce on the right. The middle column shows whether or not the information from the email signature is new. If the information for a field has not changed, *(No change)* is displayed. If the details in the email signature are different than the information in Salesforce, the existing Salesforce data will appear in grey, italics, and strikethrough. The new value will be displayed in orange. If you deselect the checkbox, the original data from Salesforce will be displayed.

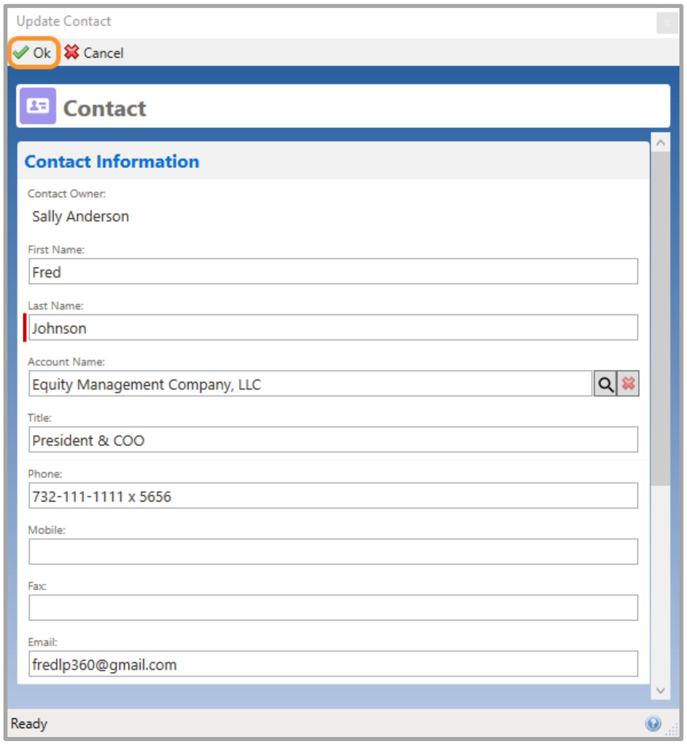
5

Click **Apply** to finalize the selection to either create or update the record and launch a Smart Form.



6

Review the Contact information in the Smart Form to create or edit the Contact. Click **Ok** to save the changes and create or update the record in Salesforce.



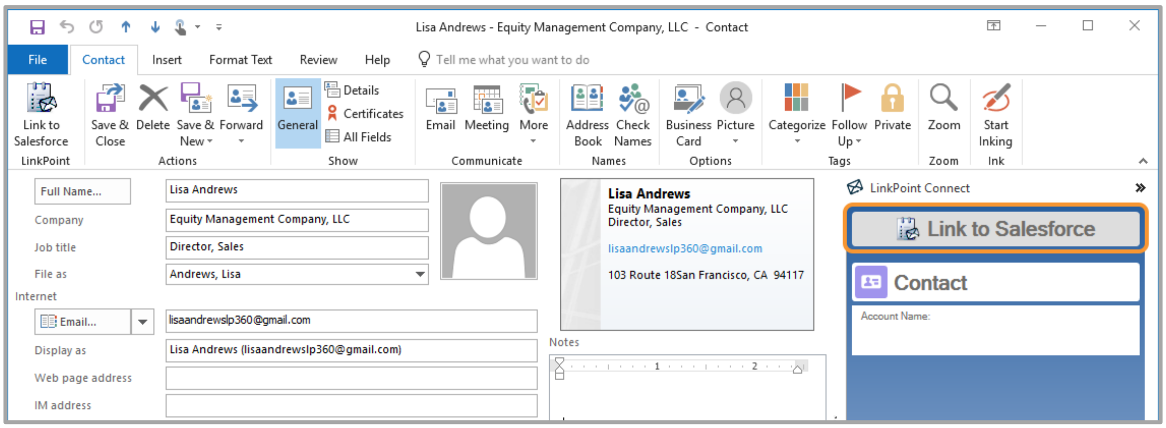
7

Return to Outlook and select the email from the Contact. Note that the Side Panel now displays the current Contact information from Salesforce.

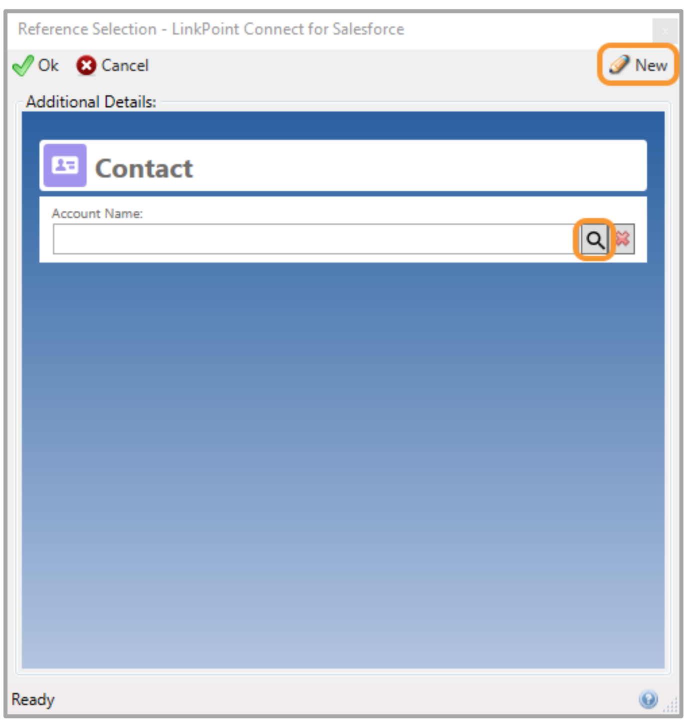
Relating an Outlook Contact to a Salesforce Account

LinkPoint Connect enables users to associate existing Outlook Contacts with Salesforce Accounts, allowing items to be created once and then sync as needed between systems. In this section, you will learn how to relate Outlook Contacts to Salesforce Accounts and include them in the LinkPoint Connect Contact Sync.

1. Open a **Contact** record in Outlook and click the **Link to Salesforce** button.

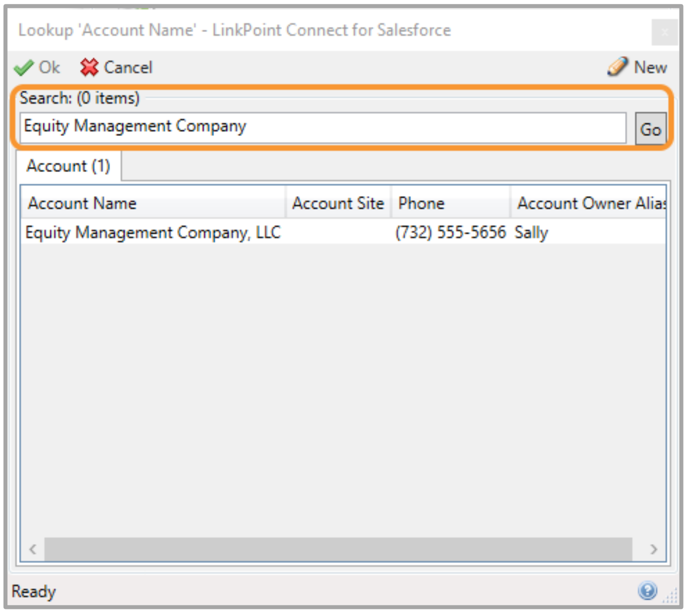


2. Select the option to look up an existing Salesforce Account in the **Account Name** field by clicking the magnifying glass icon or click the **New** button to create a new Account using Smart Forms.

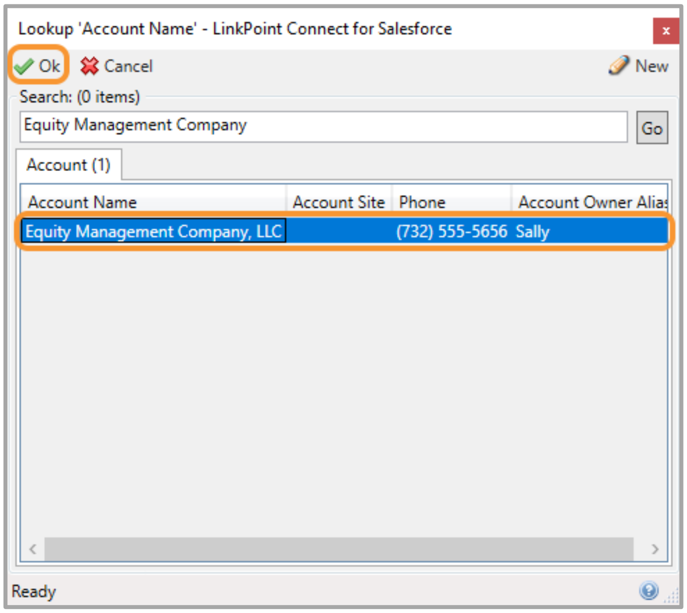


Example: In this example, we will demonstrate how to look up an existing Salesforce Account.

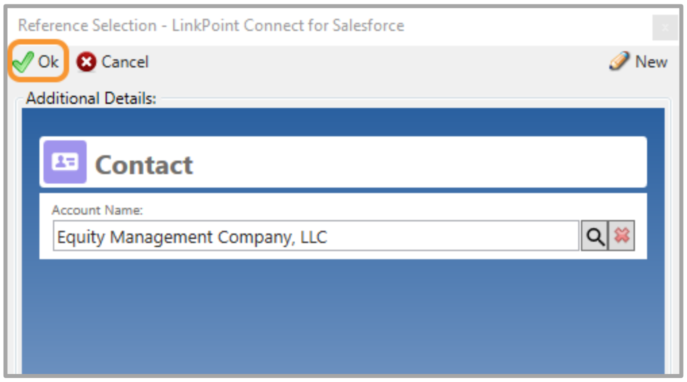
3 Click the magnifying glass icon, enter an Account Name in the Search field, and click **Go**. The Account list will populate with all matching Salesforce records.



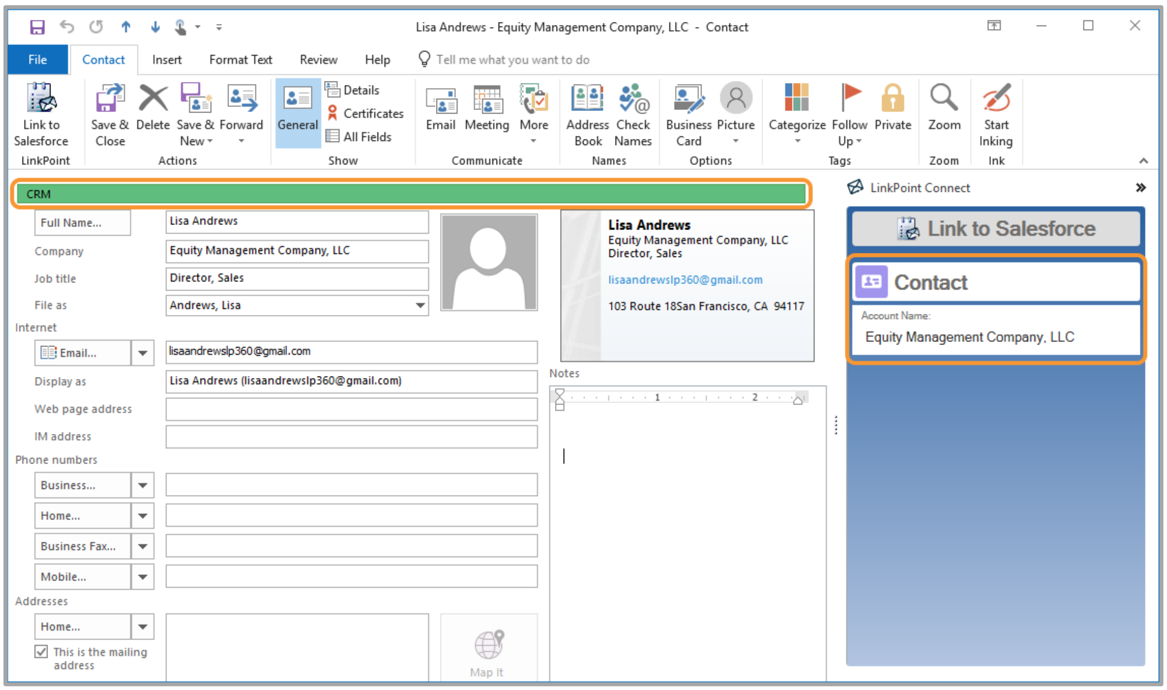
4 Select an Account from the list and click **Ok**.



5 Click **Ok** in the Reference Selection window to confirm the Account.



6 Note that the Contact is now marked with a CRM category to ensure that it is included in the next Contact Sync. The Side Panel displays the Account that the Contact will be related to in Salesforce once the sync runs.

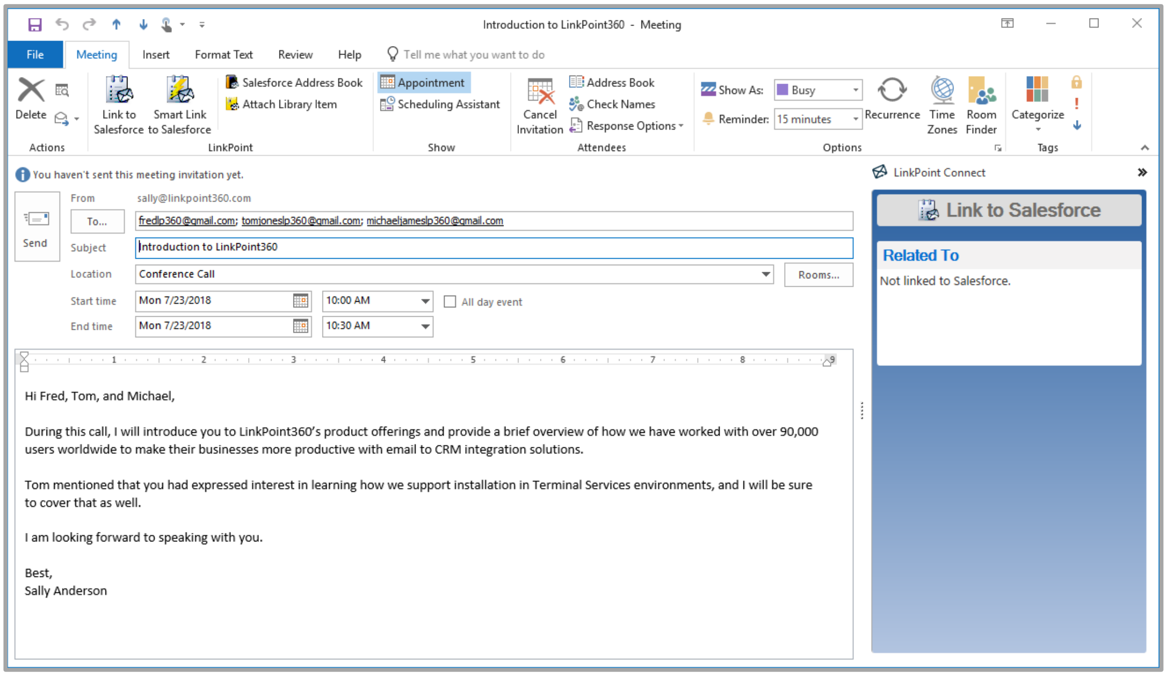


7 Click the **Save & Close** button to save the Contact in Outlook. LinkPoint Connect will sync the Contact to Salesforce during the next scheduled or manual sync depending on your settings.

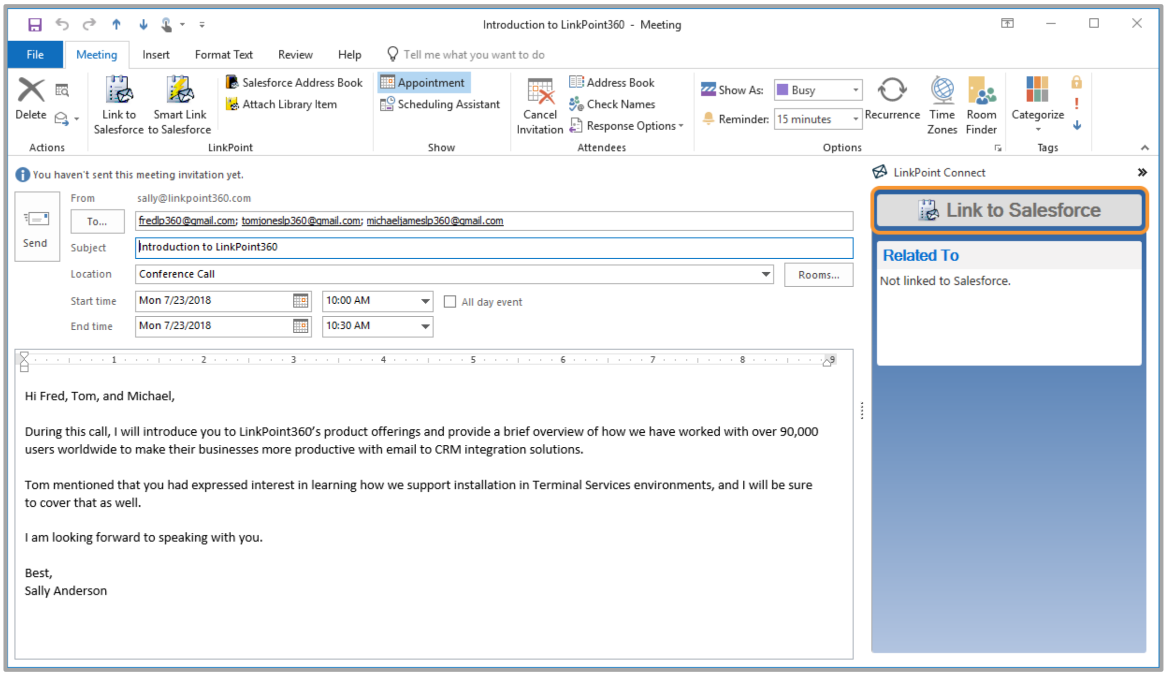
Relating an Outlook Calendar Item to a Salesforce Record

LinkPoint Connect enables users to associate existing Outlook Meetings and Appointments with Salesforce Accounts, allowing items to be created once and then sync as needed between systems. In this section, you will learn how to relate calendar items in Outlook to existing Salesforce records.

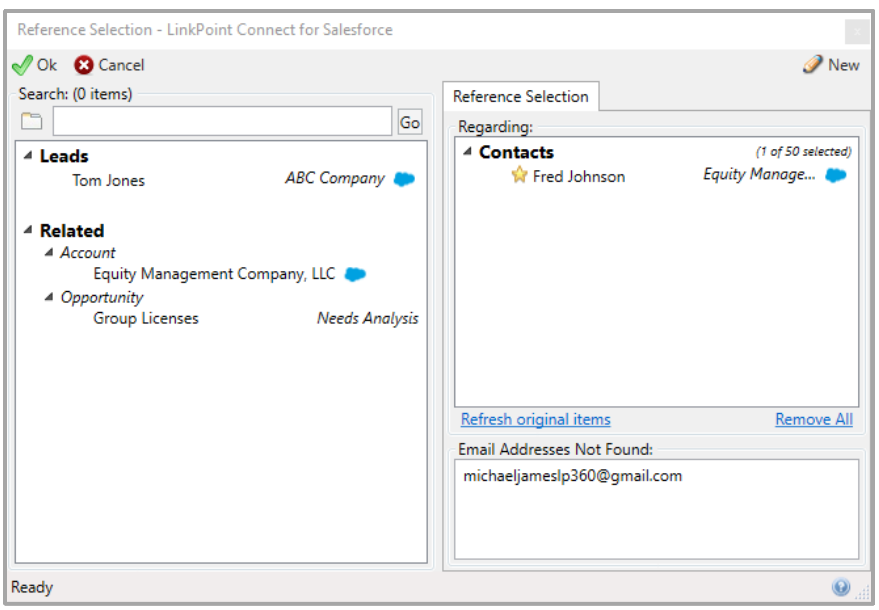
1 Open a **Meeting** or **Appointment** in Outlook and enter information for the item including the invitees, subject, location, date, time, and content.



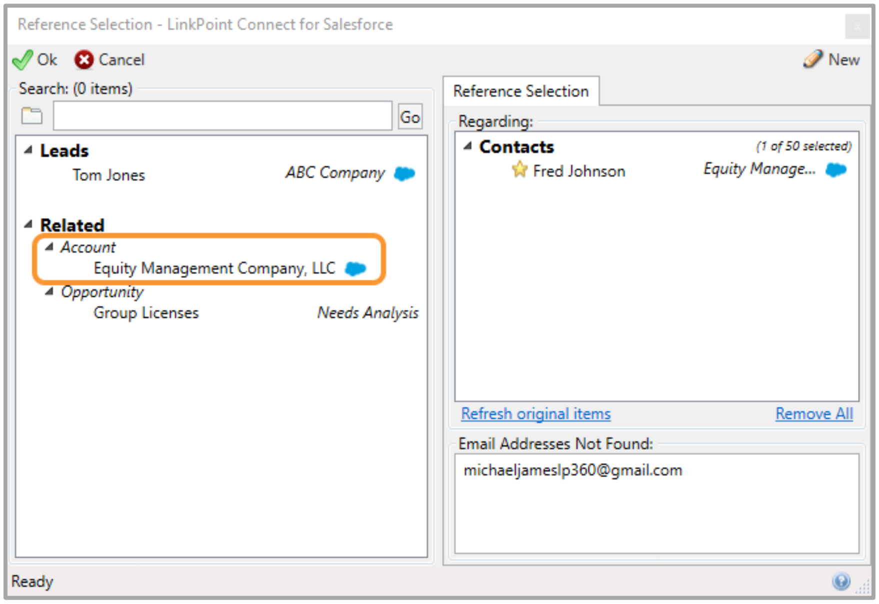
2 Click the **Link to Salesforce** button in the Side Panel.



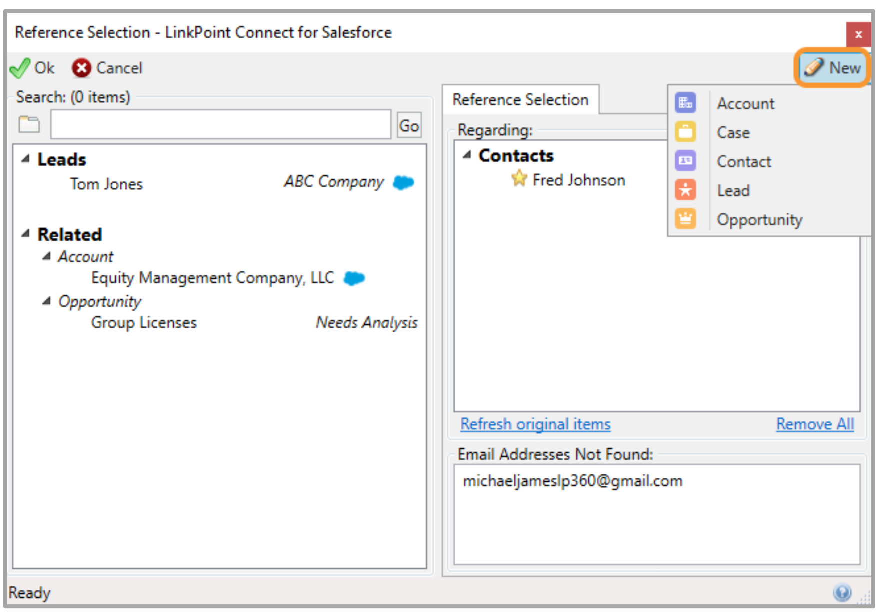
3 Review the recommended records in the **Reference Selection** window. This information is based on existing related Salesforce records that match the email addresses included on the meeting. If you are working with an Appointment, the results will be blank, but you can use the Search field to find the required records.



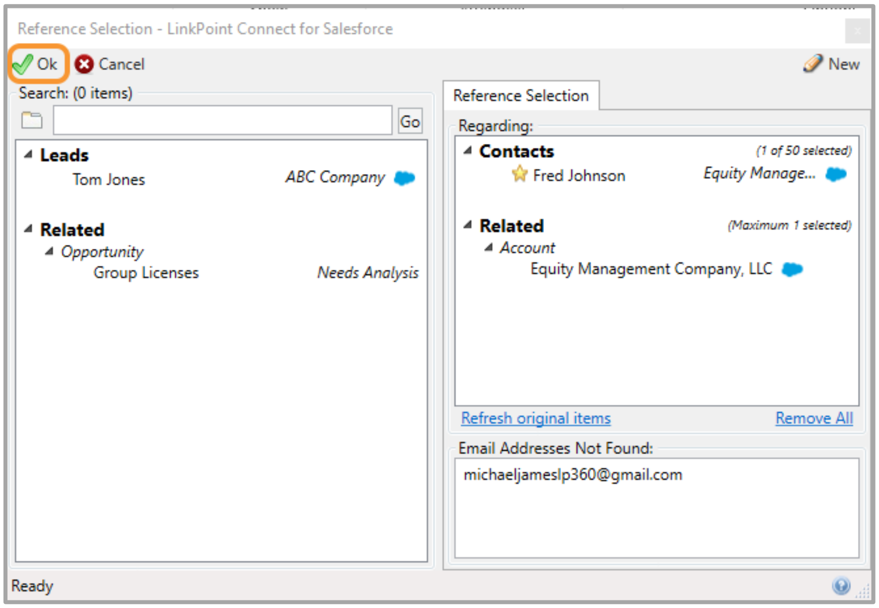
4 Select any additional Contacts or records to relate to the calendar item. Double click items on the left pane or click the green arrow to add them to the **Regarding** pane. Double click items on the **Regarding** pane or click the red x to remove them.



Tip: Select the **Smart Forms** icon and then select the record type to create new records in Salesforce. This is useful for creating records that may be related to the meeting invite you are sending.



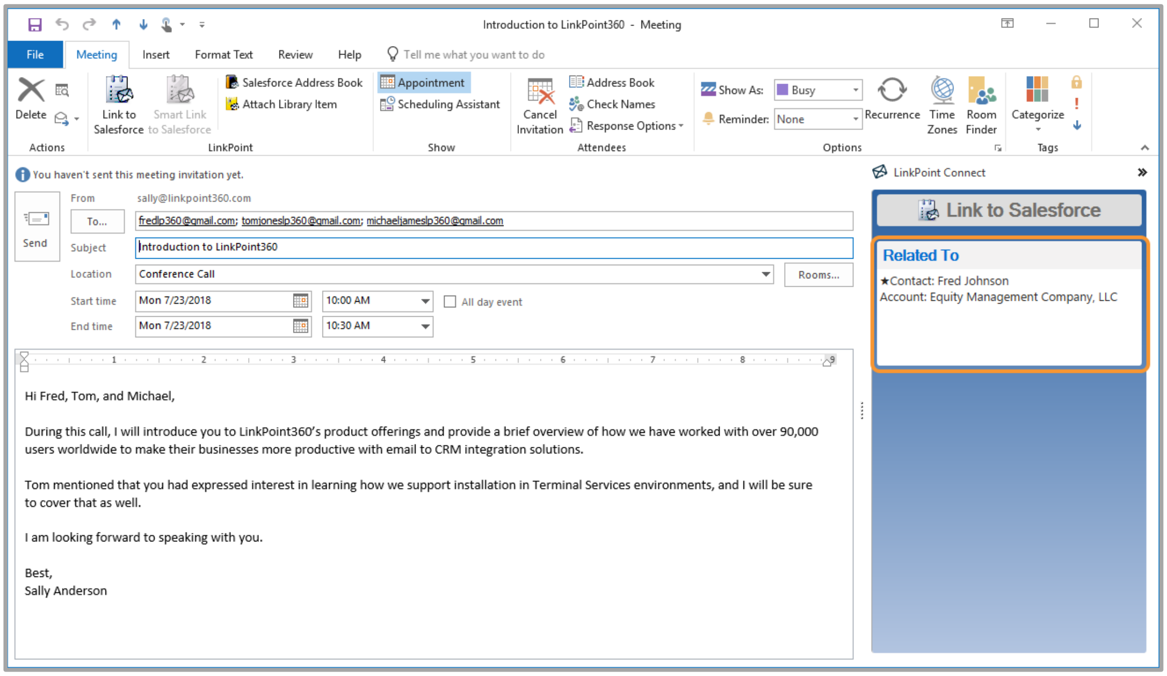
5 Click the **Ok** button in the Reference Selection window to continue.



Tip: Some organizations configure their instance of Salesforce to limit association of records to one "who" (such as a Contact) and one "what" (such as a Case or Opportunity). In this instance, you will only be able to assign or relate the item to one Contact and one additional record in Salesforce. If your organization enables recording to multiple Contacts and/or multiple record types, you will be able to select these items in the Reference Selection window. Speak with your internal Salesforce admin to learn more about how your organization uses this Salesforce feature. Contact LinkPoint360 Support for assistance with enabling LinkPoint Connect to mirror your Salesforce processes.

6

Note that there are now records listed in the **Related To** section of the new Meeting within the Side Panel.



Tip: Customers that use custom objects or forms will see the information displayed in the Related To section of the Side Panel.

7

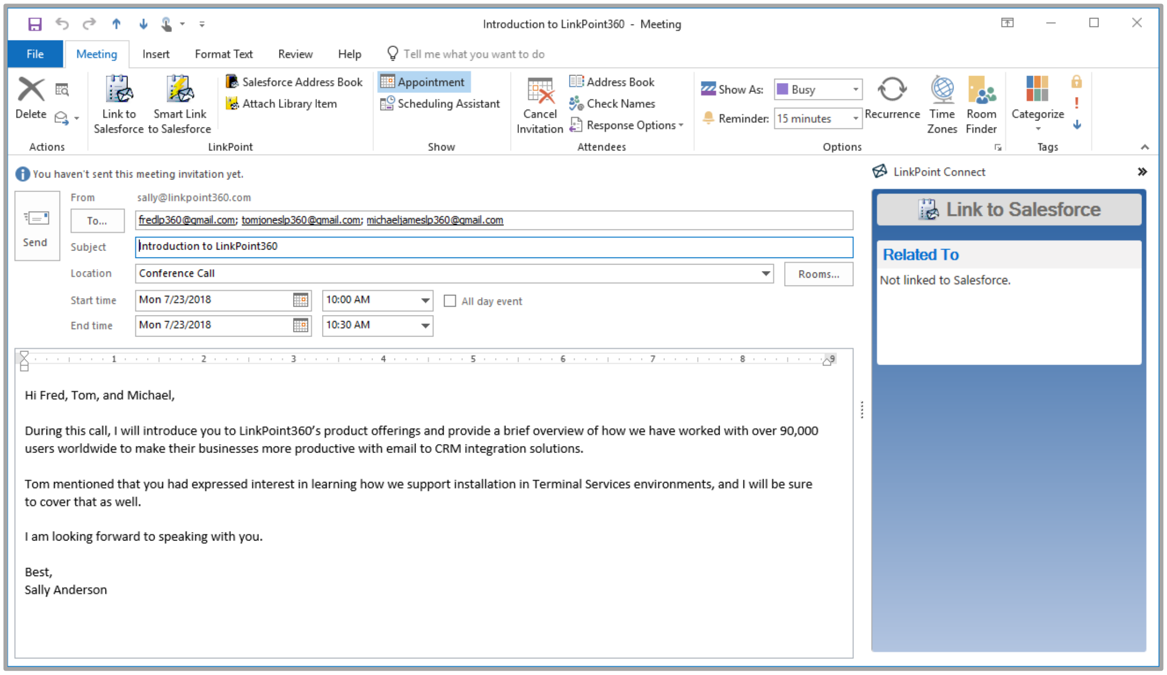
Click the **Send** button to create the Meeting and send it to the listed recipients.

Tip: LinkPoint Connect will sync the Meeting to your calendar in Salesforce during the next scheduled or manual sync depending on your settings. The Meeting will also be releated to the selected Salesforce records.

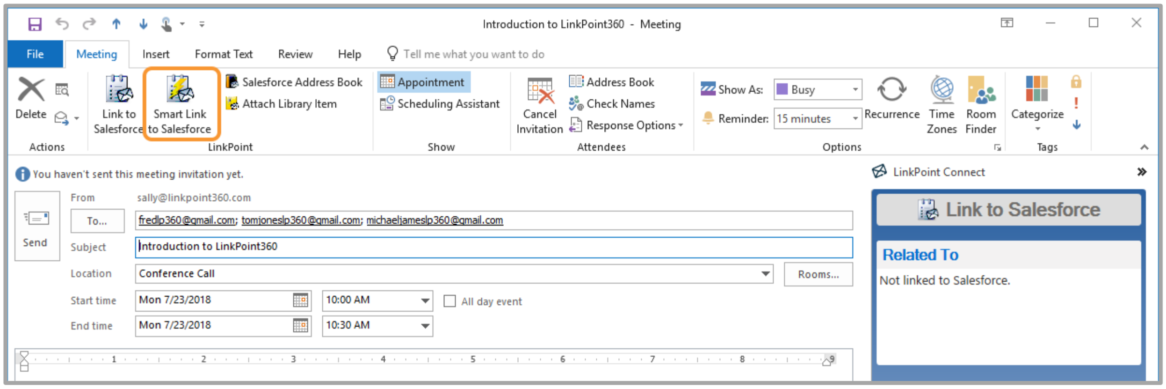
Using Smart Link to Relate Outlook Calendar Items to Salesforce Records

LinkPoint Connect enables users to associate existing Outlook Meetings and Appointments with Salesforce Accounts, allowing items to be created once and then sync as needed between systems. The Smart Link feature automatically detects matching Salesforce records to relate to a specific calendar item. In this section, you will learn how to relate Outlook calendar items to existing Salesforce records with Smart Link.

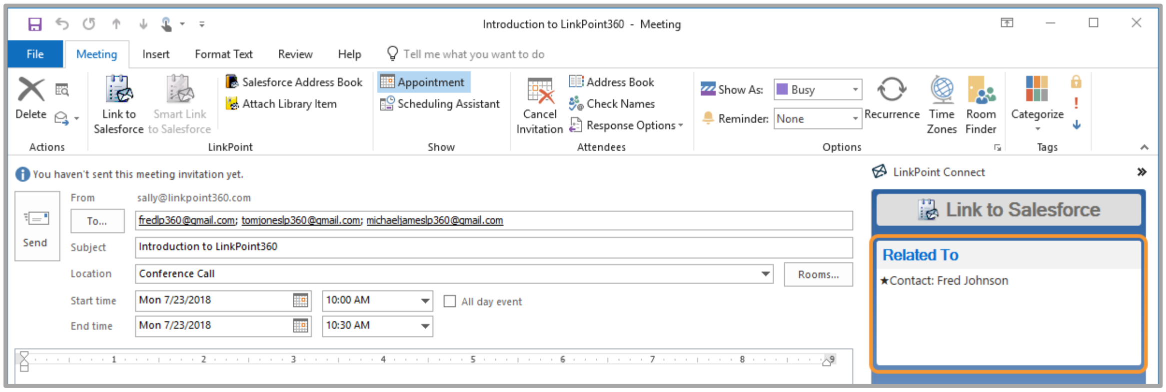
1 Open a **Meeting** or **Appointment** in Outlook and enter information for the item including the invitees, subject, location, date, time, and content.



2 Click the **Smart Link to Salesforce** button in the LinkPoint section of the Outlook Ribbon.

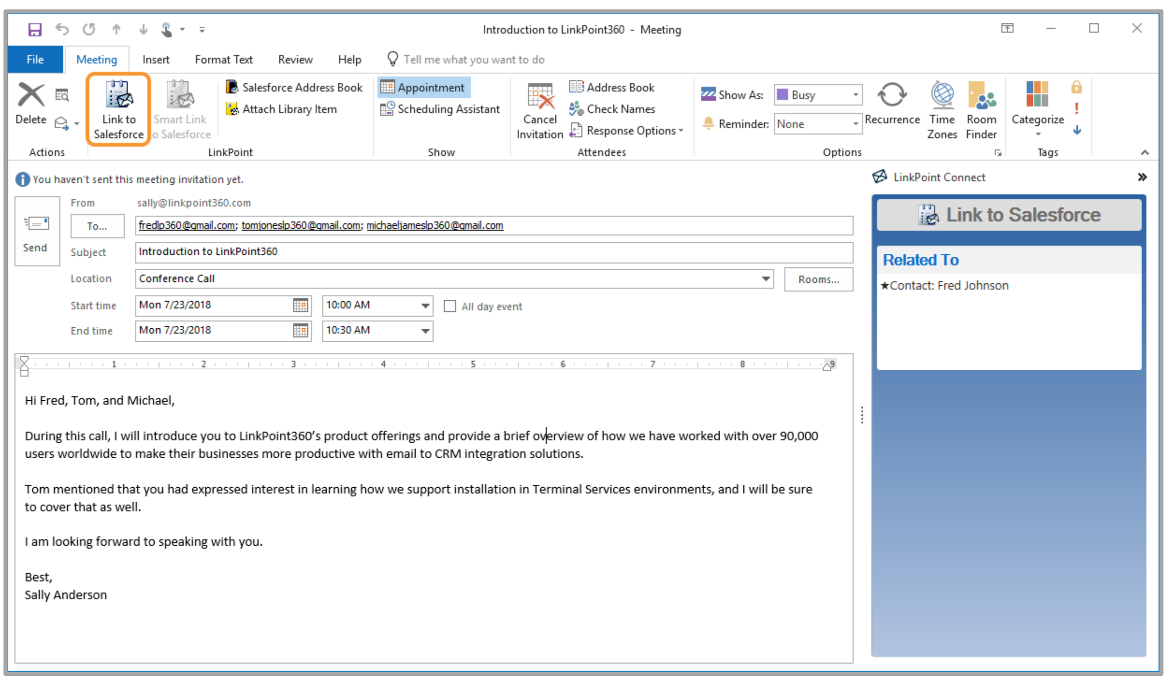


3 LinkPoint Connect will compare the email addresses listed in the **To:** field with the Lead and Contact records in Salesforce. Any Leads or Contacts for which LinkPoint Connect finds a match will be automatically added within the **Related To** section of the Side Panel.



Tip: Due to restrictions set by Salesforce, users cannot relate a mix of Leads and Contact records at the same time. If you list both Leads and Contacts in the To: field, Smart Link will automatically relate the calendar item to the Contact record(s).

Tip: If you want to relate the calendar item to a combination of Contacts and objects such Opportunities or Cases or need to make changes to the records listed by Smart Link, click the **Link to Salesforce** button.

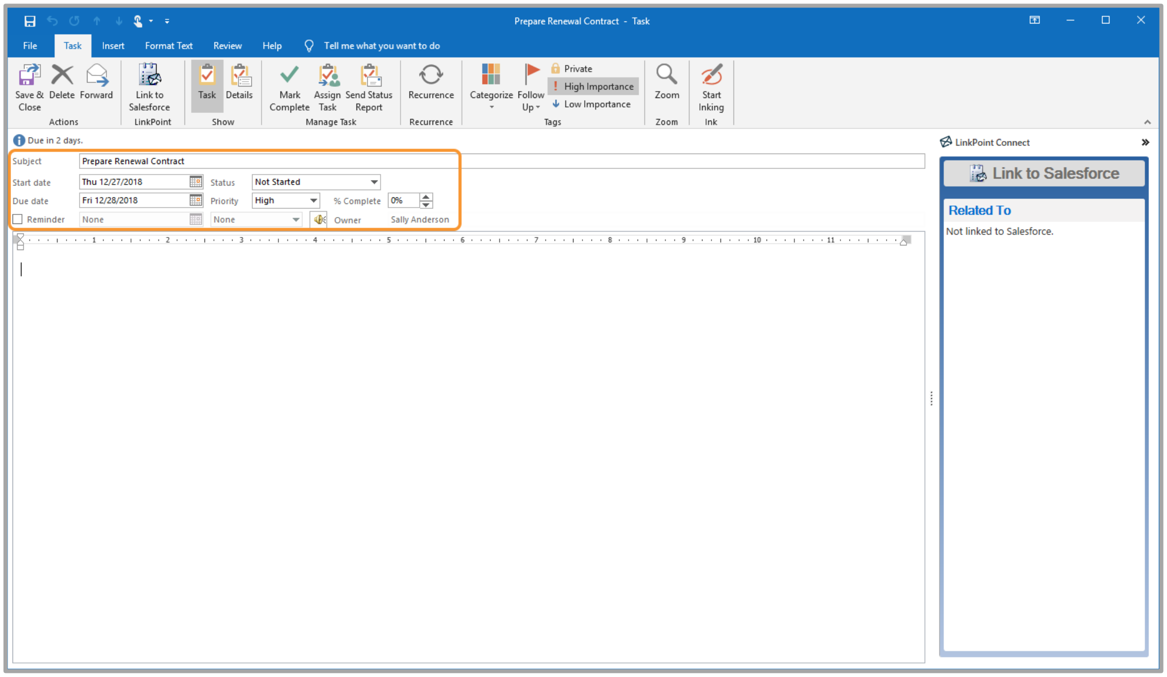


4 Click the **Send** button. LinkPoint Connect will sync the Meeting to your calendar in Salesforce during the next scheduled or manual sync depending on your settings. The Meeting will also be releated to the selected Salesforce records.

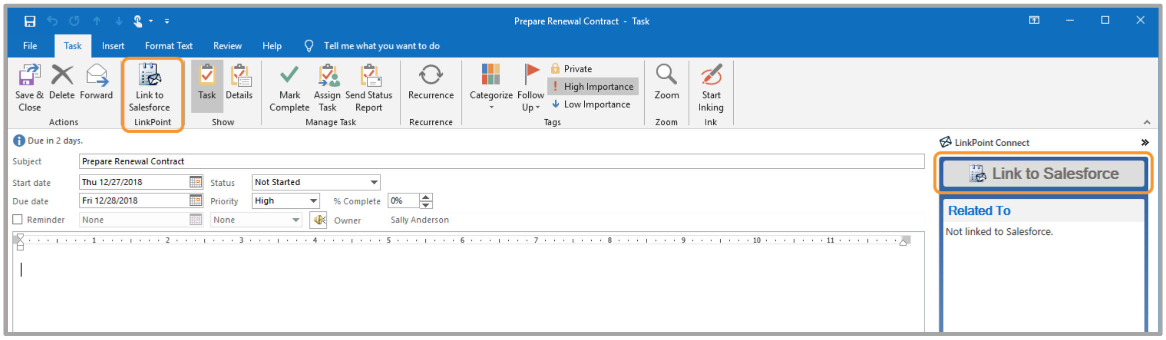
Relating an Outlook Task to a Salesforce Record

LinkPoint Connect enables users to associate existing Outlook Tasks with Salesforce records, allowing items to be created once and then sync as needed between systems. The Link to Salesforce feature allows users to select matching Salesforce record to relate to a specific task item. In this section, you will learn how to relate Outlook task items to existing Salesforce records.

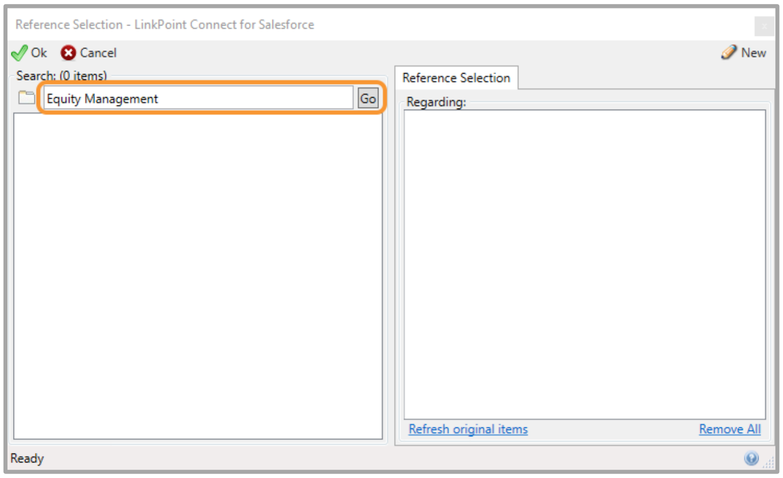
1. Open a **Task** in Outlook and enter information for the item including subject, start date, due date, and priority.



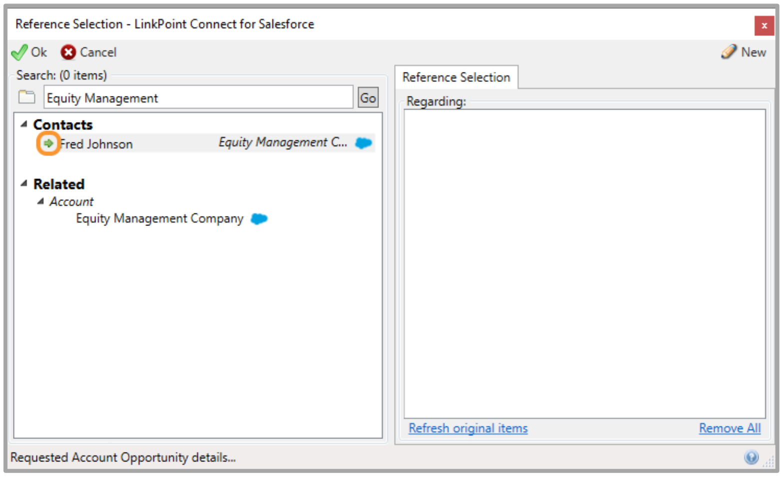
2. Click the **Link to Salesforce** button in the LinkPoint section of the Outlook Ribbon or in the LinkPoint Connect Side Panel.



3 Enter search terms for Accounts, Contacts, Leads, or other Salesforce records items in the **Search** field and click **Go** in the **Reference Selection** window.

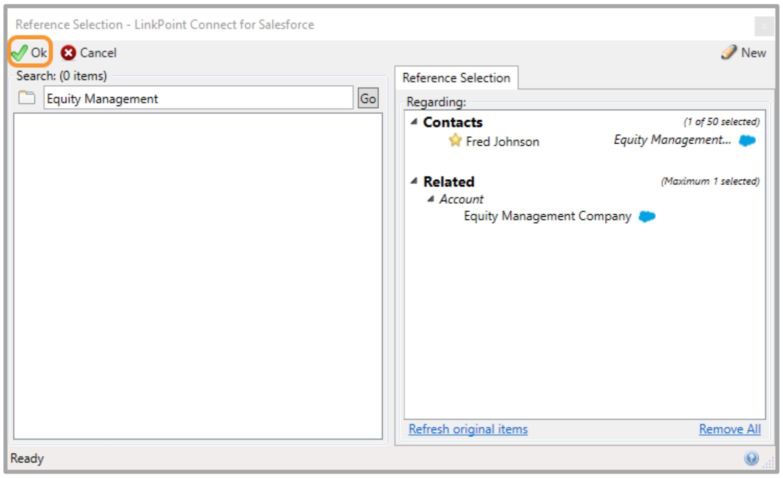


4 Click the **green arrow** or double click an item to add items to the **Regarding:** section.

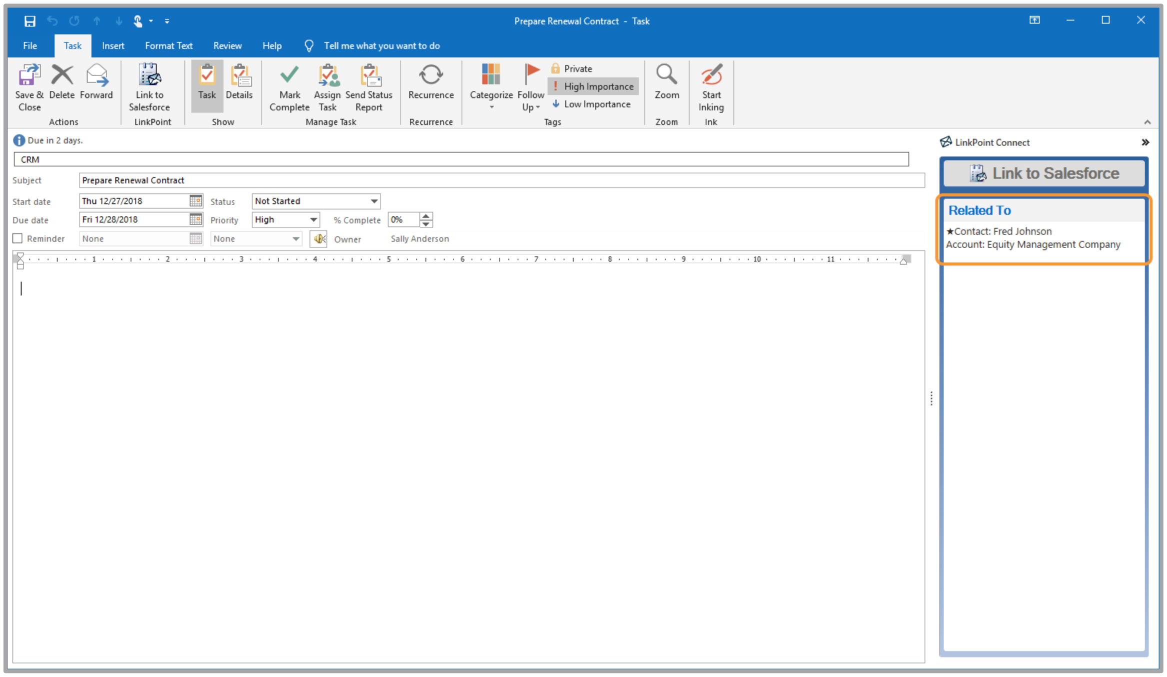


5

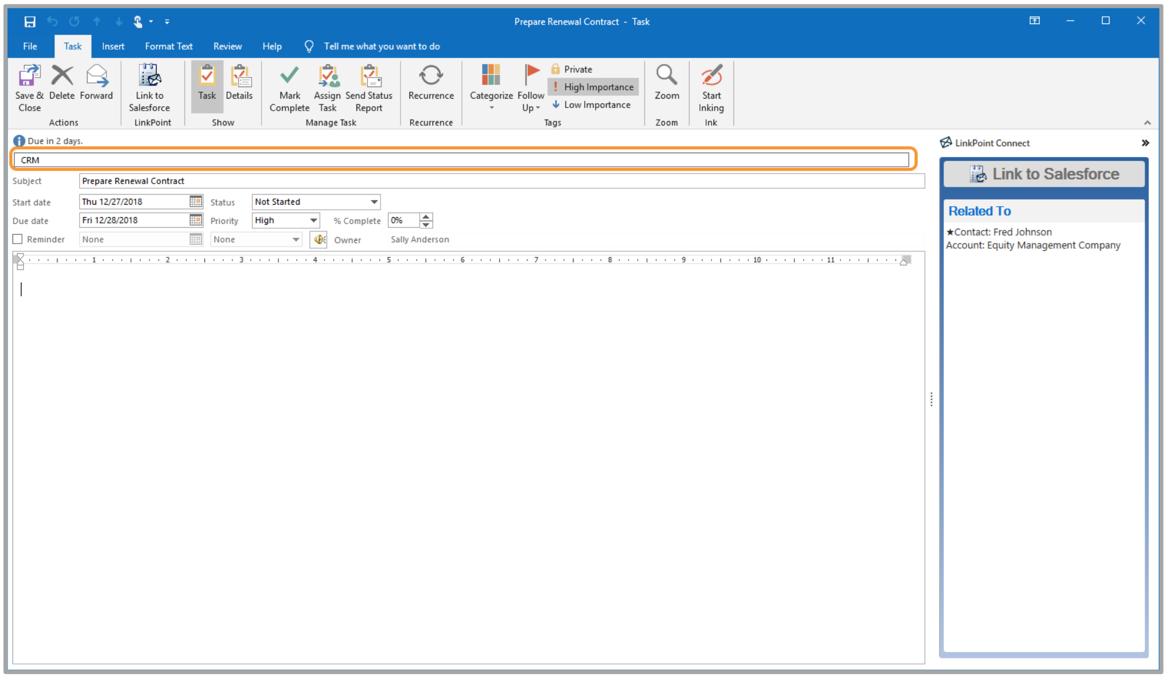
Click **Ok** to close the **Reference Selection** window.



Tip: Note that the **Side Panel** now displays the **Related To** selection for reference.



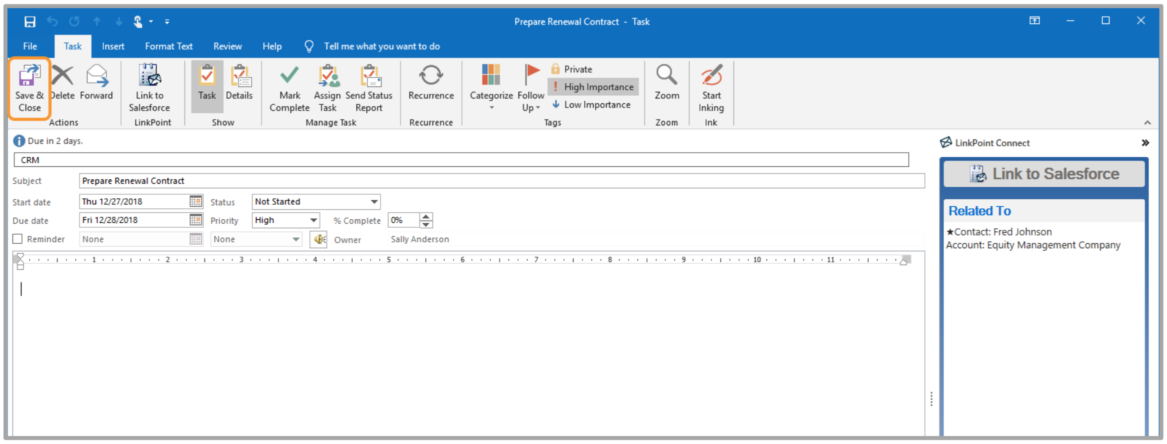
Tip: LinkPoint Connect will add a **CRM Category** to the item after you relate Salesforce records. This flags the item for the system to reference in the next scheduled sync.



Warning: Relating tasks to Salesforce records using the Link to Salesforce feature does not force the item to sync between systems. You also need to enable the sync settings in LinkPoint Assist.

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

6 Click the **Save & Close** button in the Outlook Ribbon to create the task.

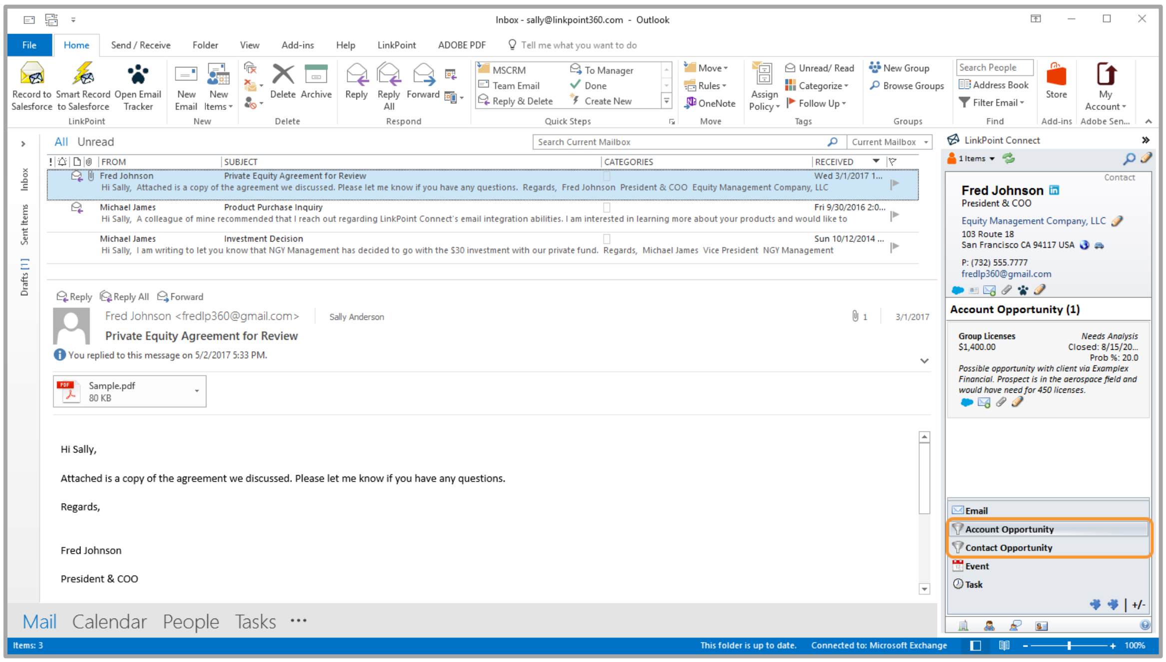


Creating a New Salesforce Opportunity from Outlook

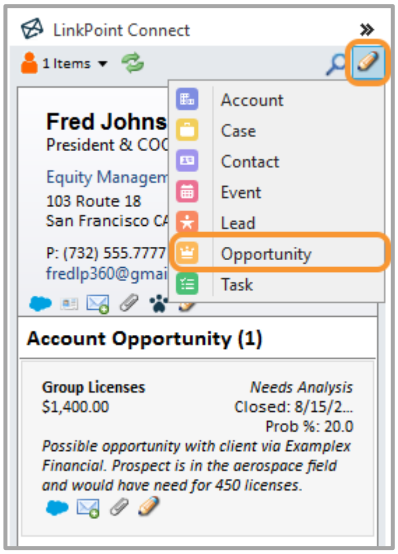
LinkPoint Connect helps users remain in Outlook while creating new Salesforce records with minimal manual data entry. In this section, you will learn how to create a new Salesforce Opportunity from Outlook.

Tip: Depending on how an organization has configured LinkPoint Connect to mirror your existing business processes, users may not have all of the options described in the following section. Contact your internal IT admin for more information.

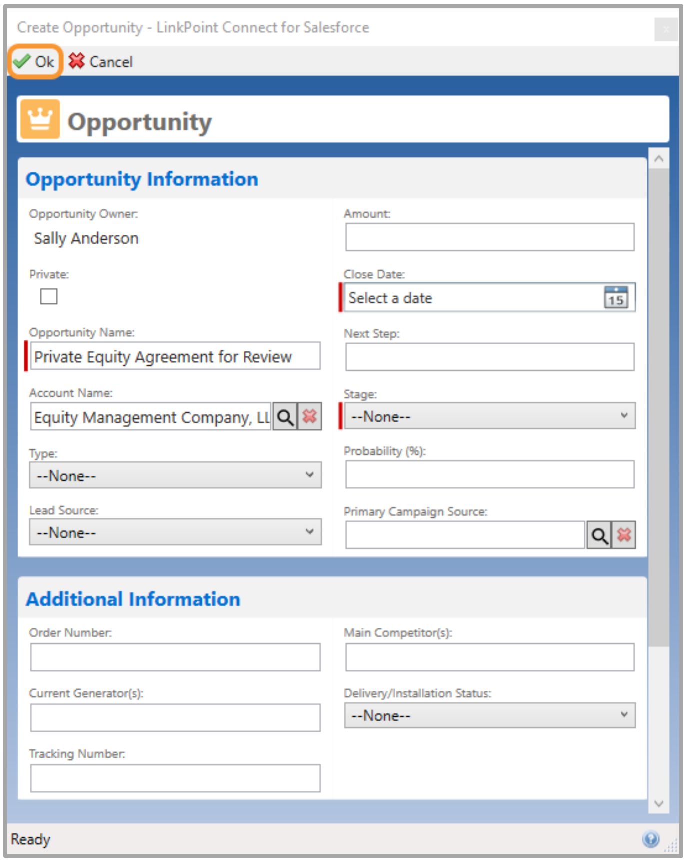
1. Select an email and note that the Side Panel displays the related Contact information. Select **Account Opportunity** or **Contact Opportunity** on the Navigation Pane to display the Related Information for the Contact.



2 Click the **Smart Form** icon to create a new Opportunity.



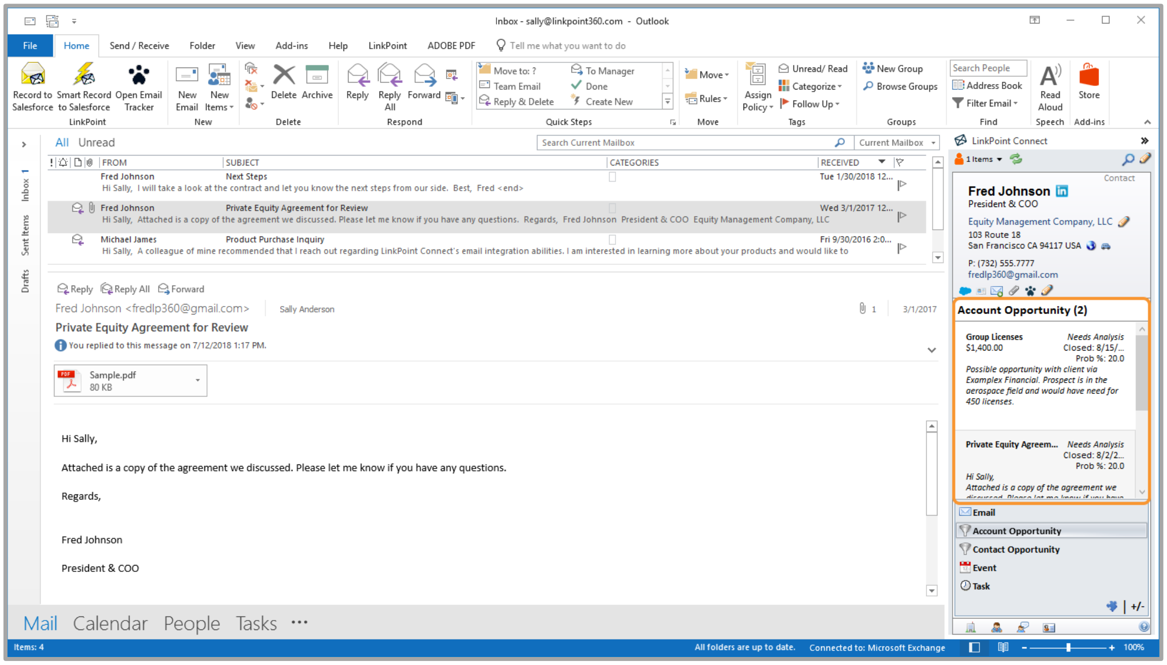
3 Enter any required or additional information in the Opportunity Smart Form. Note that the Account Name field is prepopulated by LinkPoint Connect. Click **Ok** to create the record in Salesforce.



Tip: LinkPoint Connect will not override any business rules within your instance of Salesforce. If additional fields are required to create the Opportunity, the user will need to enter the information in order to proceed.

4

The newly created Opportunity will be listed in the Related Information in the Side Panel.

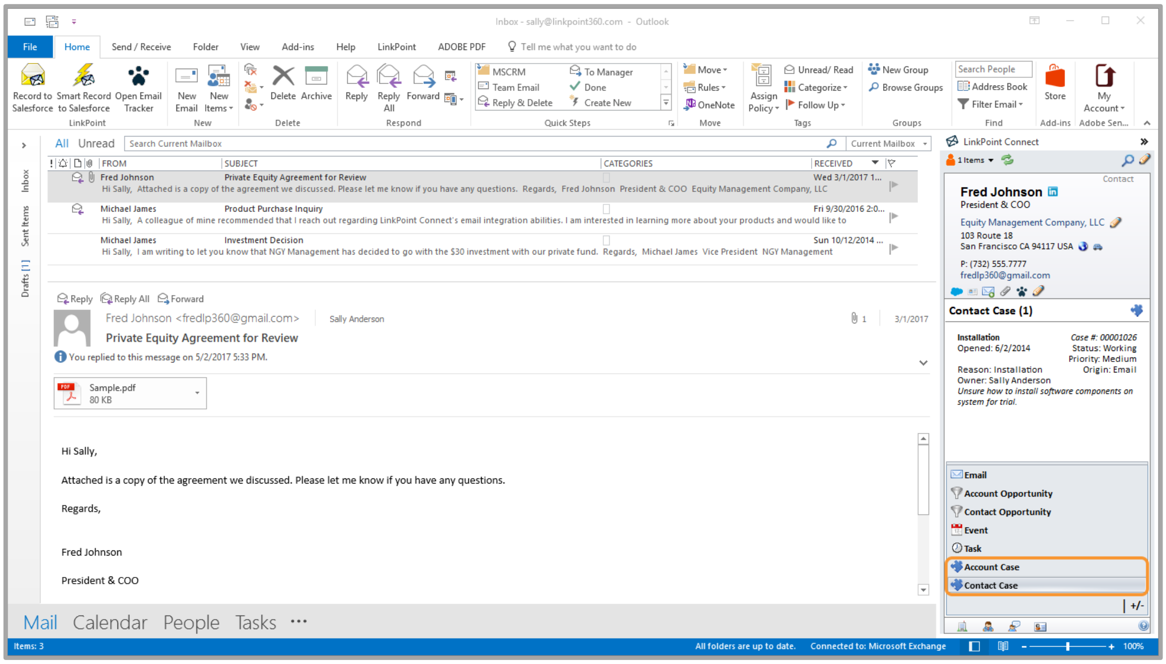


Creating a New Case in Salesforce from Outlook

LinkPoint Connect helps users remain in Outlook while creating new Salesforce records with minimal manual data entry. In this section, you will learn how to create a new Salesforce Case from Outlook.

Tip: Depending on how an organization has configured LinkPoint Connect to mirror your existing business processes, users may not have all of the options described in the following section. Contact your internal IT admin for more information.

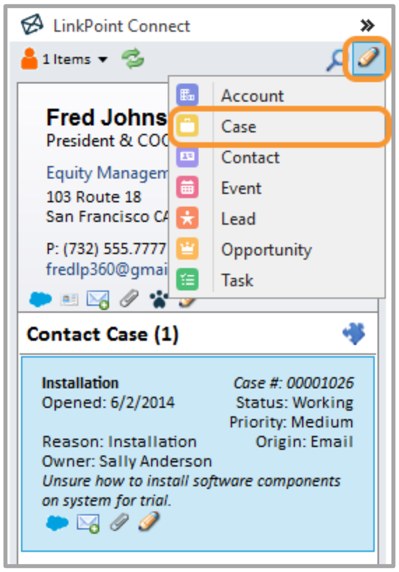
1. Select an email and note that the Side Panel displays the related Contact information. Select **Account Case** or **Contact Case** on the Navigation Pane to display the Related Information for the Contact.



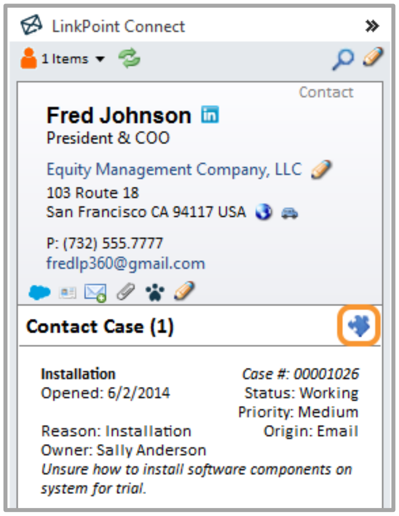
Tip: Organizations can request customization to modify the Case types and information displayed. In some instances, users may not have access to Case information or may not see details displayed for specific Case types such as Closed Cases. Please contact the LinkPoint360 Support Team for more information.

2

Click the **Smart Form** icon to create a new Case.

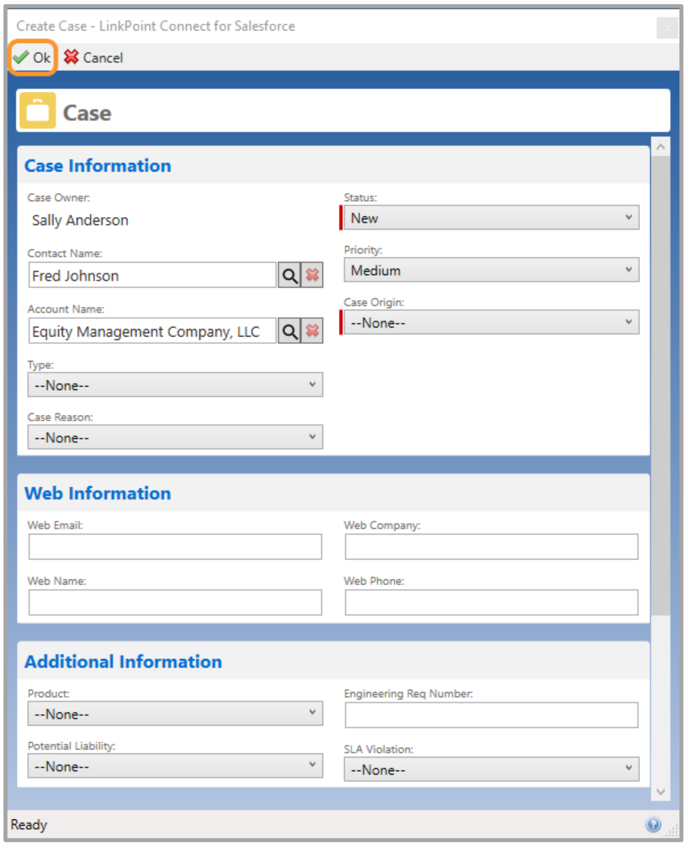


Tip: You can also click the **Create a case from selected email** icon to create a Case using the email.



3

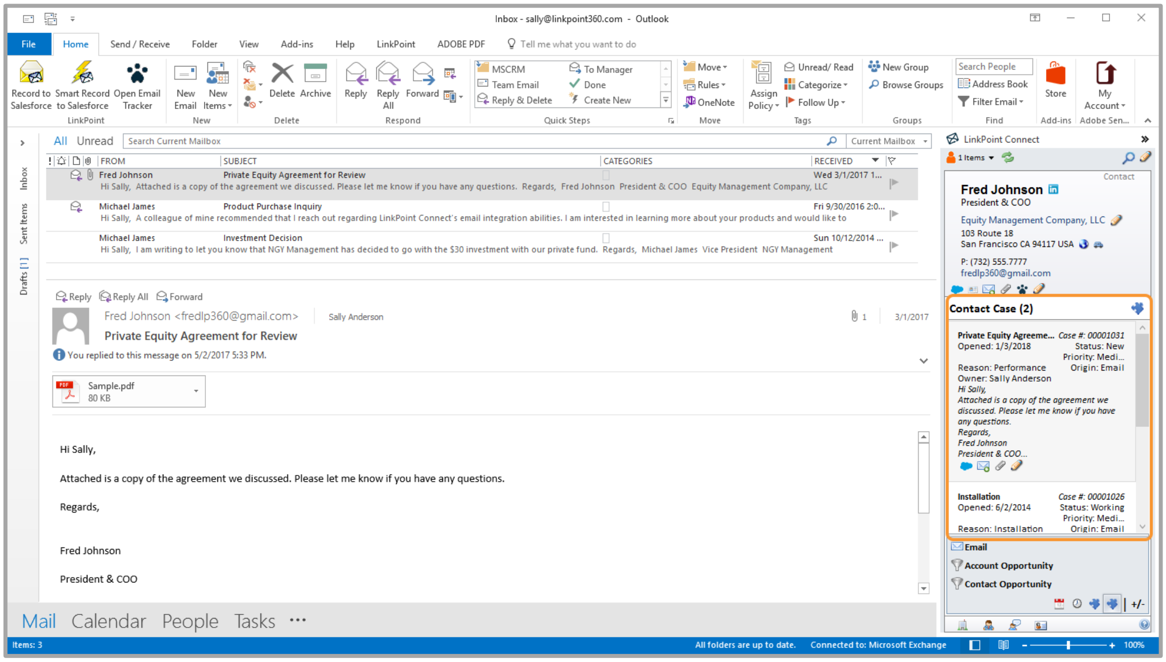
Enter any required or additional information in the Case Smart Form. Note that the Account Name and Contact Name fields are prepopulated by LinkPoint Connect. Click **Ok** to create the record in Salesforce.



Tip: LinkPoint Connect will not override any business rules within your instance of Salesforce. If additional fields are required to create the Opportunity, the user will need to enter the information in order to proceed.

4

The newly created Case will be listed in the Related Information in the Side Panel.

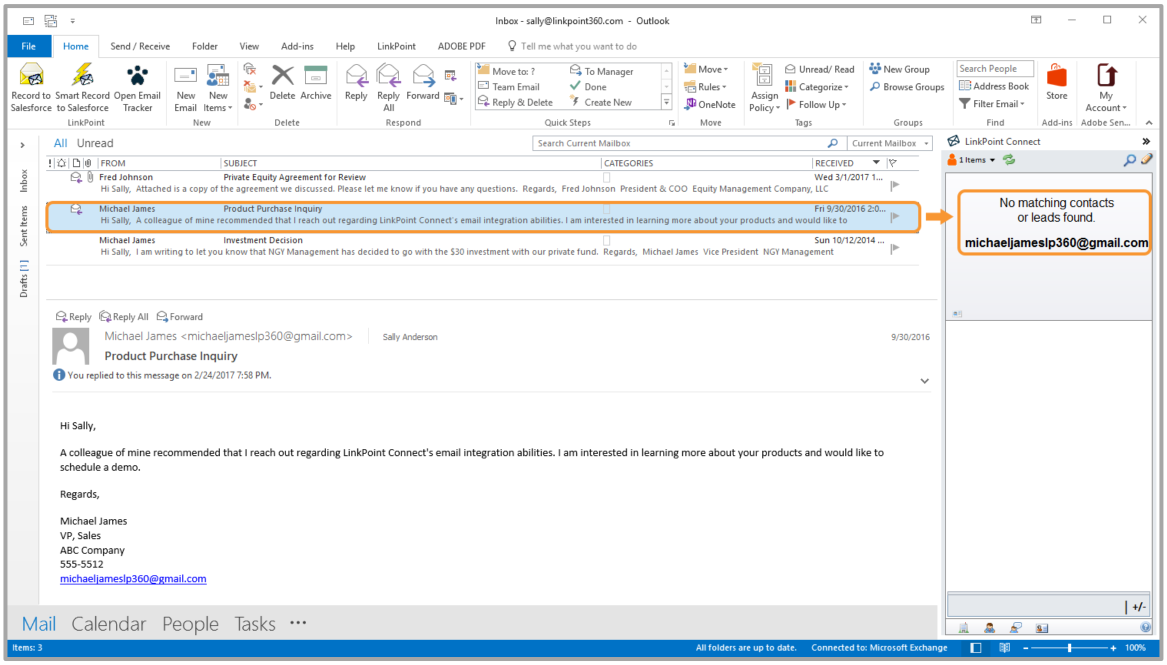


Creating a New Account in Salesforce from Outlook

LinkPoint Connect helps users remain in Outlook while creating new Salesforce records with minimal manual data entry. In this section, you will learn how to create a new Salesforce account from Outlook.

Tip: Depending on how an organization has configured LinkPoint Connect to mirror your existing business processes, users may not have all of the options described in the following section. Contact your internal IT admin for more information.

1 Select an email from a new Contact. Note that the Side Panel searched Salesforce for the Contact and did not find a record matching the sender's email address.



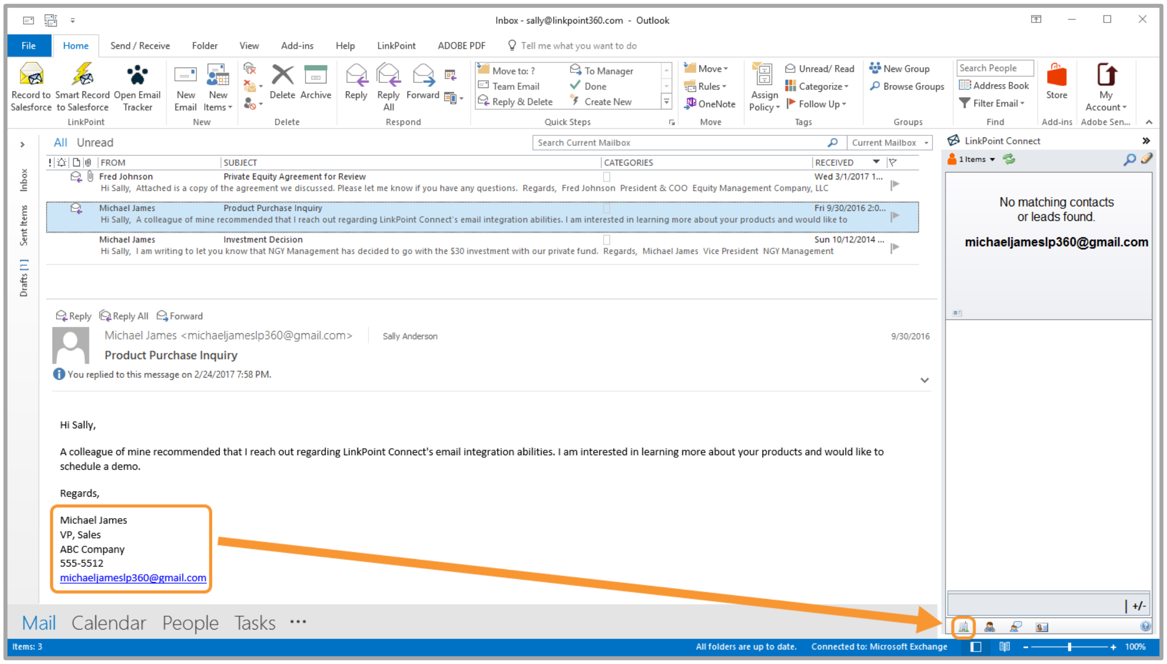
Tip: LinkPoint Connect searches Contacts based on primary email address. If you receive an email from an existing Contact and the Side Panel does not return a matching Contact, it is possible that the Contact may be in Salesforce under a different or secondary email address. You can verify before creating a new Contact by using the Search Bar in the Side Panel to look for the contact by First and/or Last Name.

Additional Resources: Users can enable the option to search based on secondary email address to expand the search results provided in the Side Panel. Refer to the **Searching and Recording Based on Secondary Email Address** section of this User Guide for more information.

Additional Resources: LinkPoint360 can customize the Search Bar to include results from custom fields. Please contact the LinkPoint360 Support Team for more information.

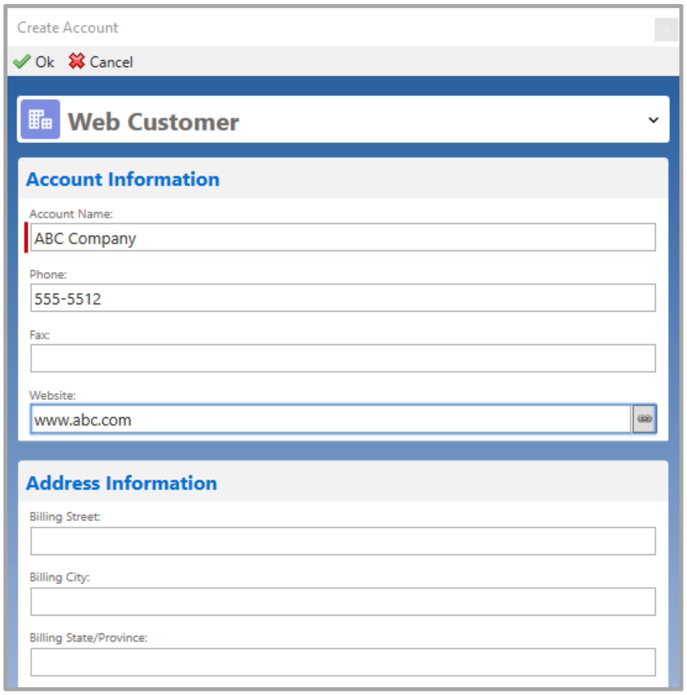
2

Highlight the signature within the email. Drag and drop the highlighted signature to the Drop Zone at the bottom of the Side Panel. Release the selection over the Account icon.



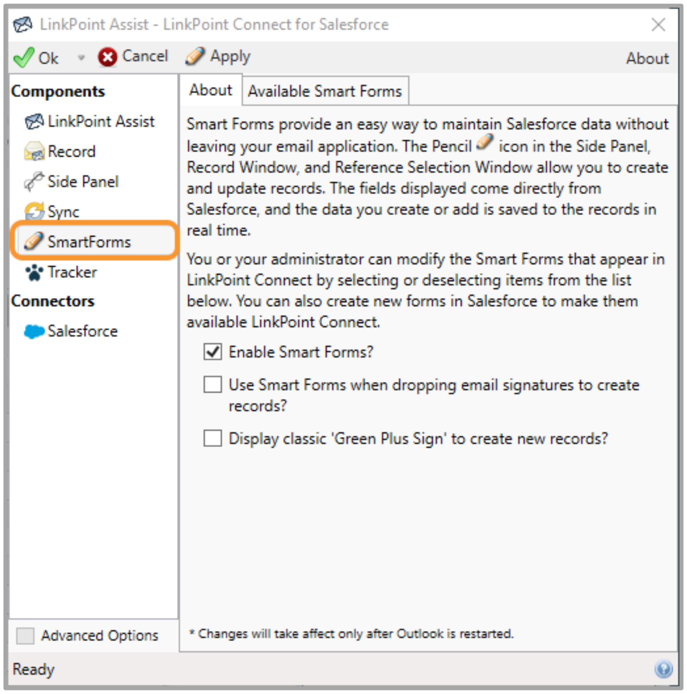
3

Enter any required information in the Smart Form for the selected record type. Note that some fields, such as Account Name, are prepopulated based on the contents of the email signature.

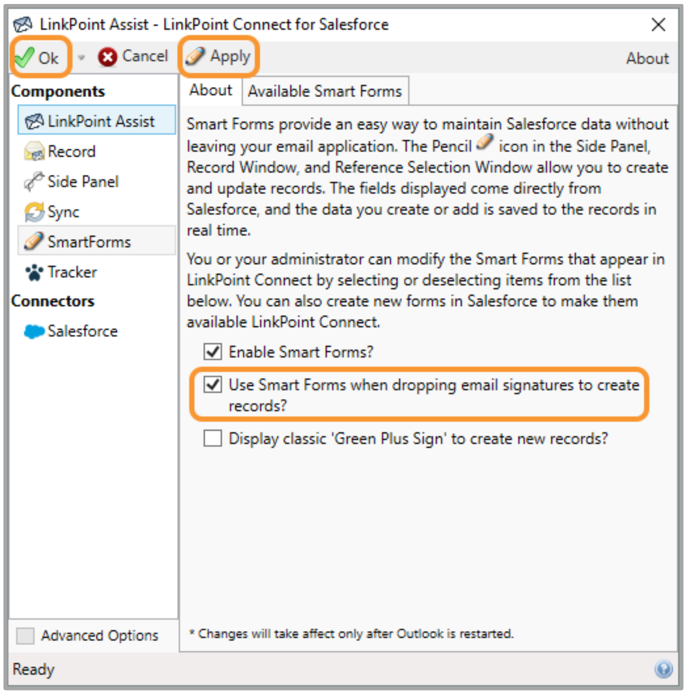


Tip: Existing customers may need to update their configuration to launch Smart Forms with drag and drop. To change whether drag and drop launches new records in Smart Forms or in Salesforce via the web browser:

1. Select **Smart Forms** from the **Components** list on the left side of the **LinkPoint Assist** window.

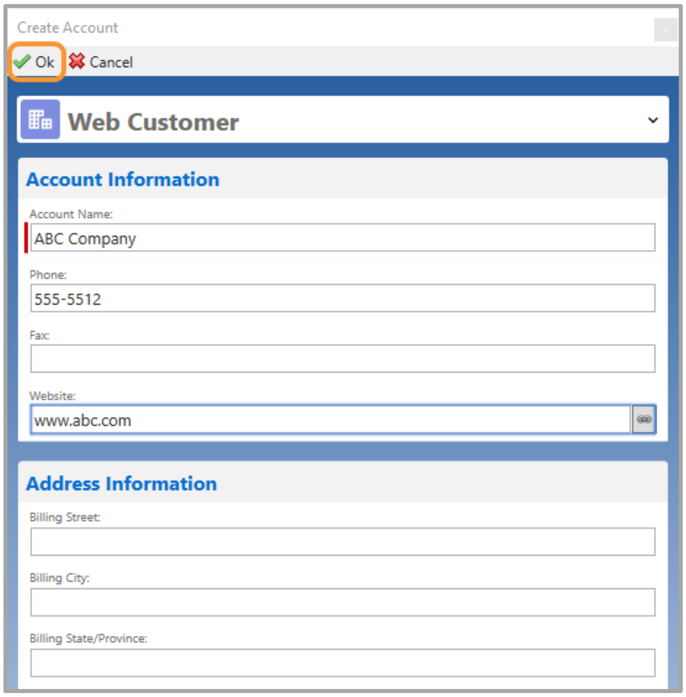


2. Select the checkbox to **Use Smart Forms when dropping email signatures to create records?**. Click **Apply** and **Ok** to finalize the changes.



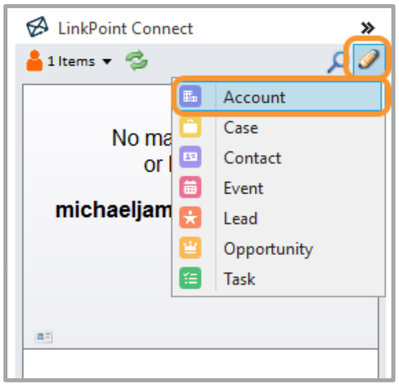
Additional Resources: Refer to the **Creating and Updated Salesforce Records with Smart Forms** section of this User Guide for more information.

4 Click **Ok** to create the record in Salesforce.



Tip: LinkPoint Connect will not override any business rules within your instance of Salesforce. If additional fields are required to create the Contact, the user will need to enter the information in order to proceed.

Tip: You can also create a new Account by clicking the **Smart Form** icon in the Side Panel and then clicking **Account** from the drop-down list.



Creating and Updating Salesforce Records with Smart Forms

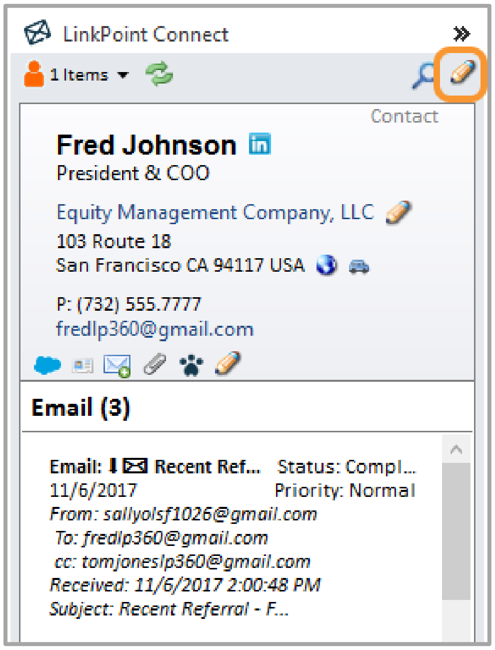
Smart Forms allow users to create and update Salesforce records with a customizable interface within Outlook. LinkPoint Connect dynamically accesses existing Salesforce Global Actions that are preconfigured. For Salesforce instances that do not include Global Actions, LinkPoint Connect provides a set of starter forms that integrate with standard objects:

- Accounts
- Cases
- Contacts
- Events
- Leads
- Opportunities
- Tasks

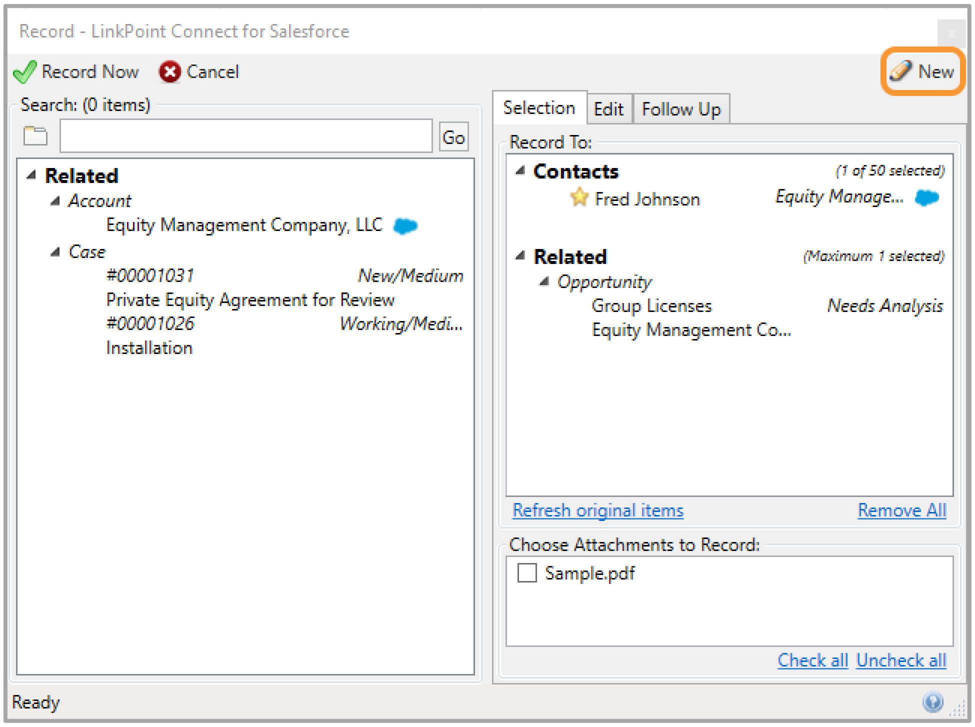
Smart Forms can be launched from a variety of shortcuts throughout LinkPoint Connect and are displayed in their own window, making it quick and easy to review available fields, enter data, and save information to Salesforce. Users can select a Record Type from a drop-down list within any applicable Smart Form. Record Types are automatically detected, and LinkPoint Connect will present the default Record Type from Salesforce. Smart Forms support custom record types and fields with additional implementation provided by the LinkPoint360 Professional Services Team. In this section, you will learn how to create and update a record using Smart Forms.

Example: In this example, we will demonstrate how to use Smart Forms to create and update Lead and Contact records in Salesforce. The steps are the same for other record types. The difference will be the different fields available within the individual Smart Forms, which are unique for each record type.

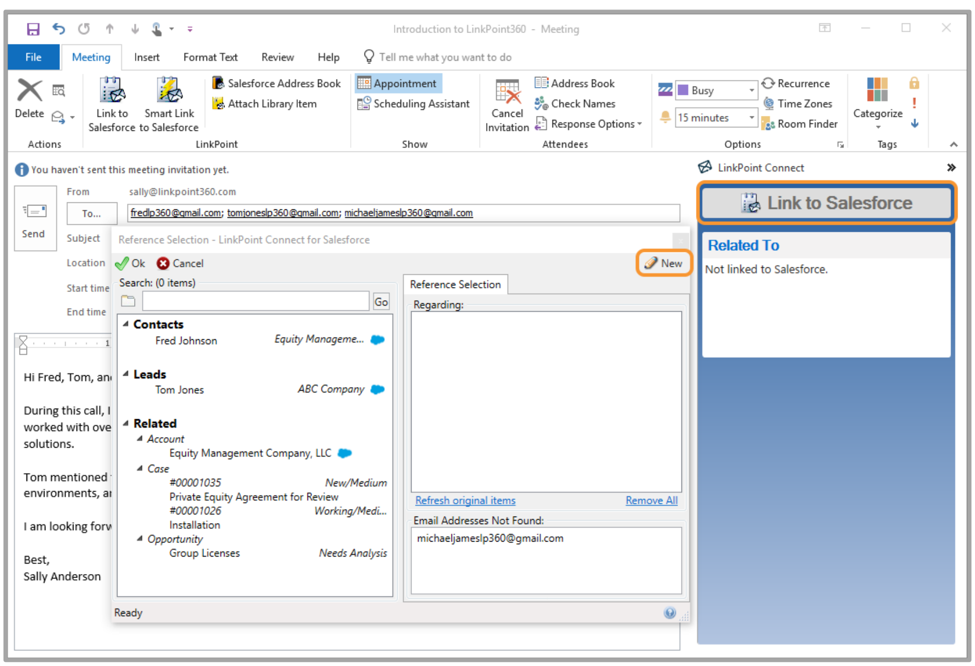
1 Open Outlook and locate the Side Panel. Click the **Smart Forms** icon in the top right corner.



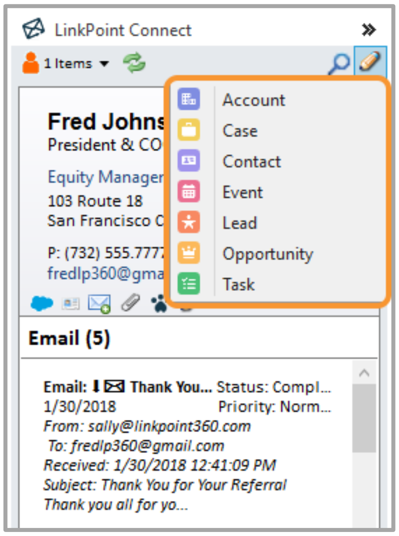
Tip: You can create new records using Smart Forms in the Record Window by clicking the **Smart Forms** icon in the top right corner.



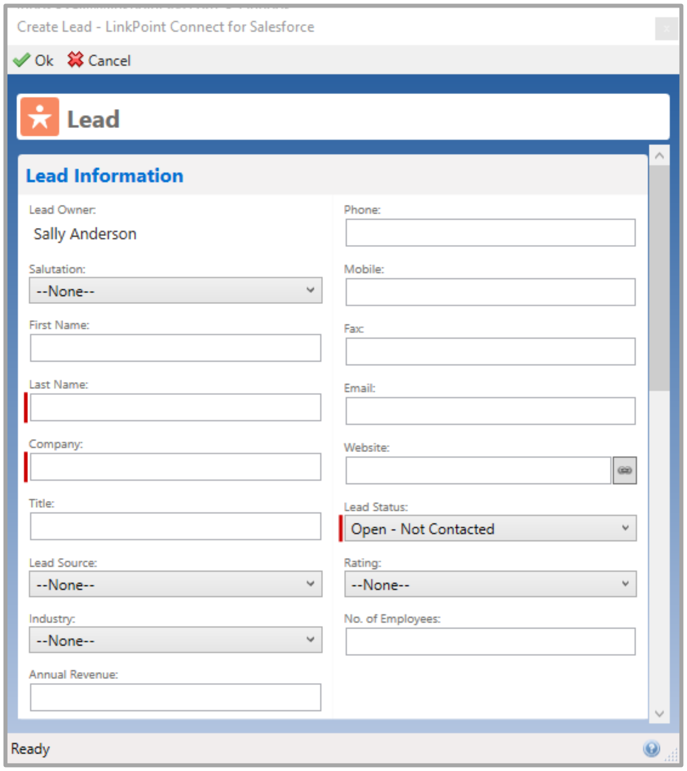
Tip: You can create new records using Smart Forms in the Reference Selection Window when working with calendar items. Click the **Link to Salesforce** option and then click the **Smart Forms** icon in the top right corner.



2 Select the object type to create.

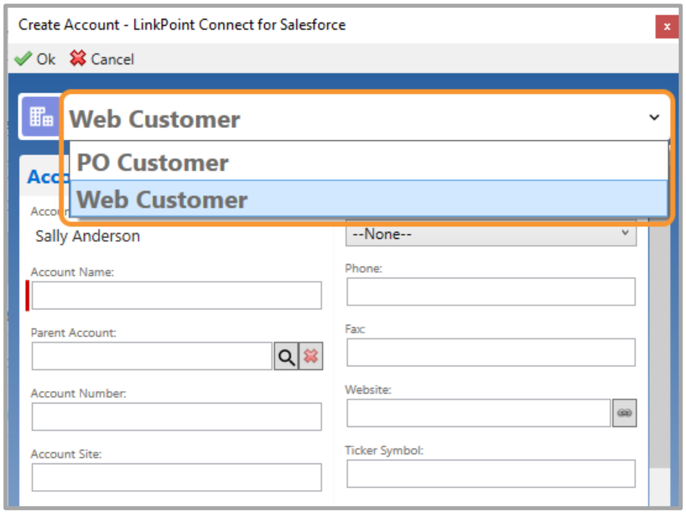


3 Enter data in the available fields in the Smart Form.



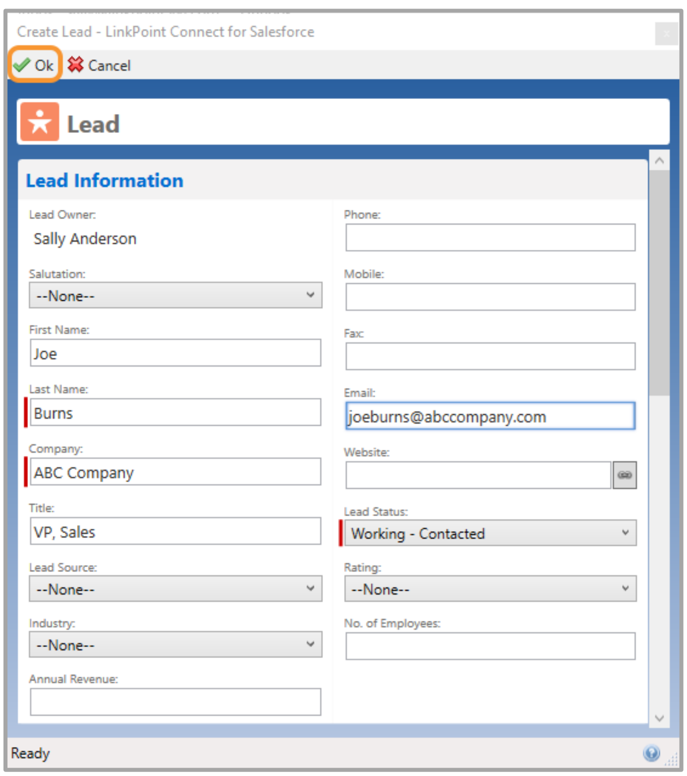
Tip: Any Salesforce required fields will also be required in the Smart Form. These are marked in red.

Tip: Users can select a Record Type where applicable for objects such as Accounts. Select the **Record Type** from the drop-down list at the top of the Smart Form. Note that these are dynamically populated based on how the object is configured in Salesforce and some objects may not include a Record Type.

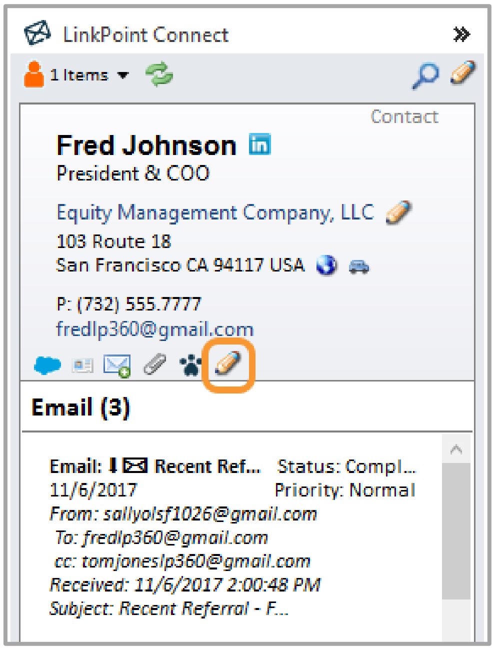


4

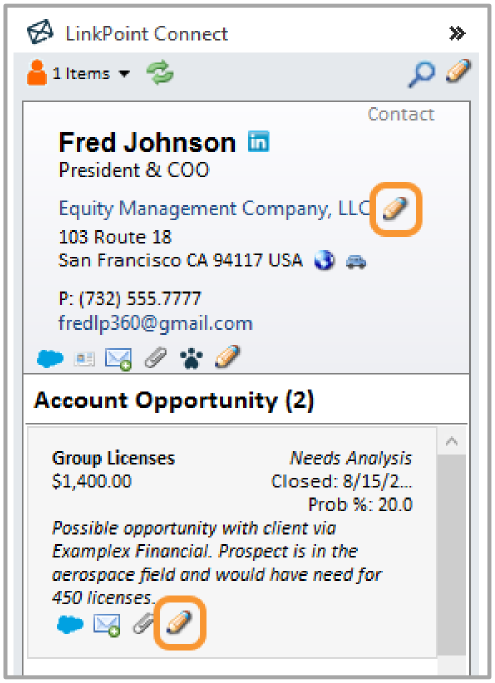
Click **Ok** to complete the Smart Form and create the record in Salesforce.



5 Click the **Smart Forms** icon within the Contact section of the Side Panel to update an existing record.

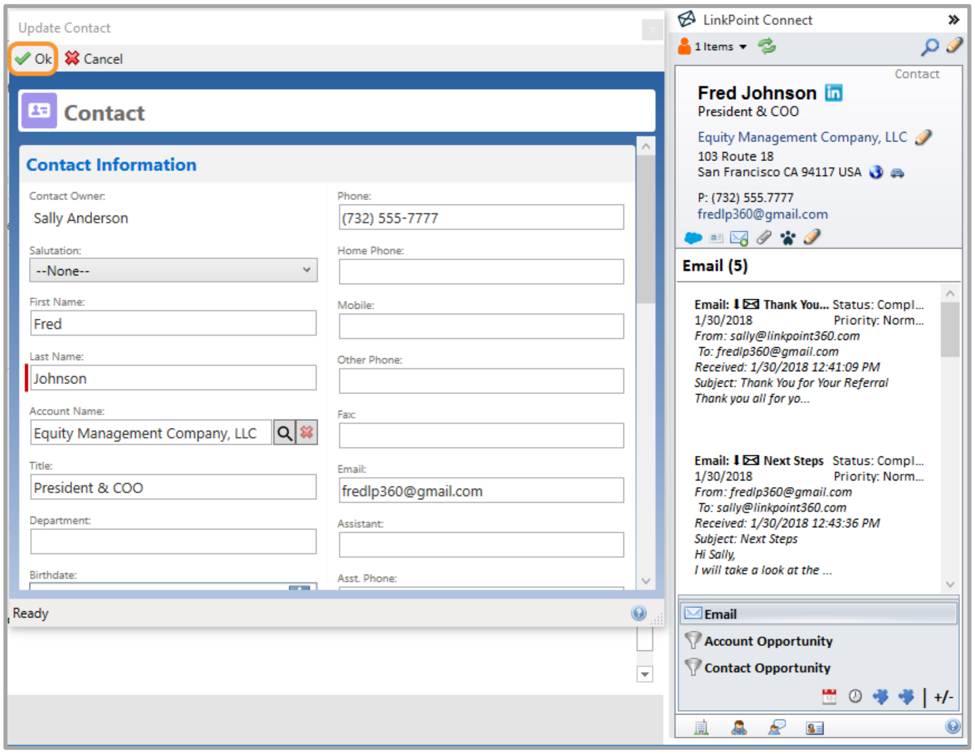


Tip: The Smart Forms icon appears throughout LinkPoint Connect for Accounts, Cases, Contacts, Events, Leads, Opportunities, and Tasks. Click the icon to update the information for each specific record as needed.



6

Edit the record as needed. Click **Ok** to save the changes to the record in Salesforce.



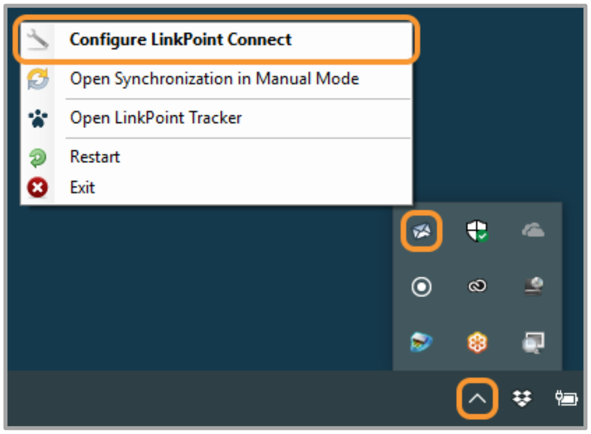
Tip: You can also launch a Smart Form when using the drag and drop feature to create new Accounts, Contacts, and Leads. Existing customers may need to update their configuration to launch Smart Forms with drag and drop by default.

Additional Resources: Refer to the **Launching Smart Forms with Drag and Drop** section of this User Guide for more information.

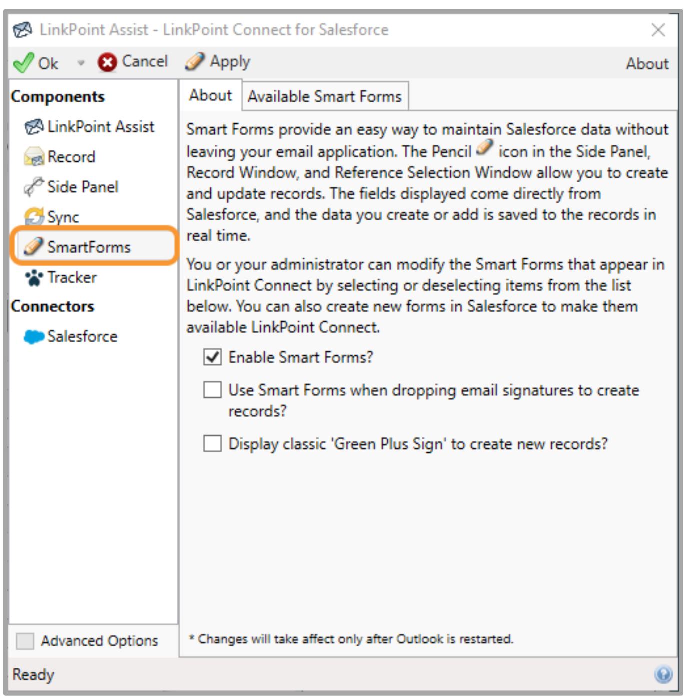
Launching Smart Forms with Drag and Drop

LinkPoint Connect users can highlight an email signature and drop the information in the Side Panel to launch a Smart Form for Salesforce Leads, Contacts, and Accounts. Smart Forms are designed launch when using the Side Panel Drag and Drop functionality but may be off by default for existing users. The feature is on by default for new users. In this section, you will learn how to configure LinkPoint Connect to launch Smart Forms when using the Drop Zone.

1. Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure LinkPoint Connect.**

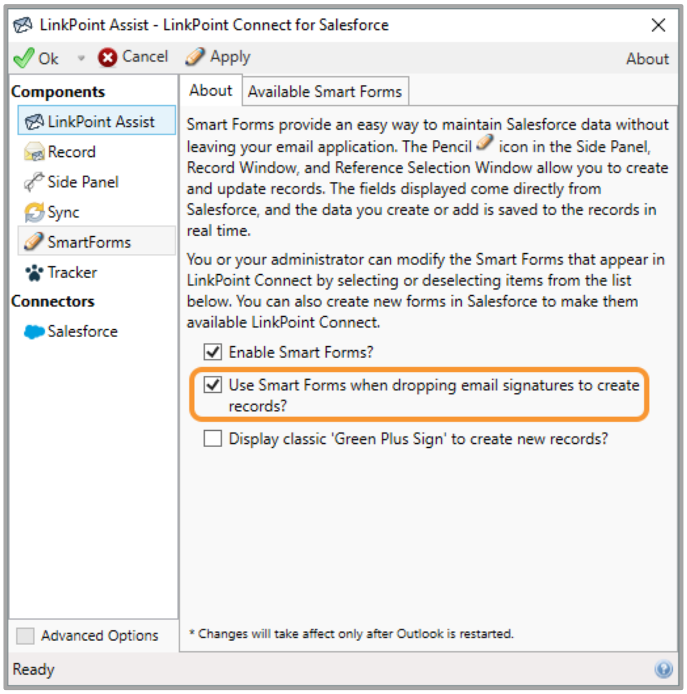


2. Select **Smart Forms** from the **Components** list on the left side of the **LinkPoint Assist** window.



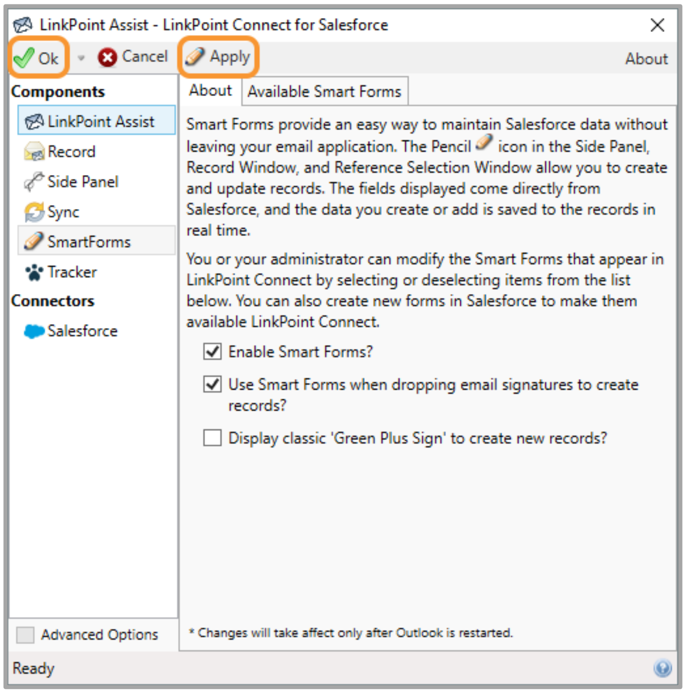
3

Select the checkbox to **Use Smart Forms when dropping email signatures to create records?**.



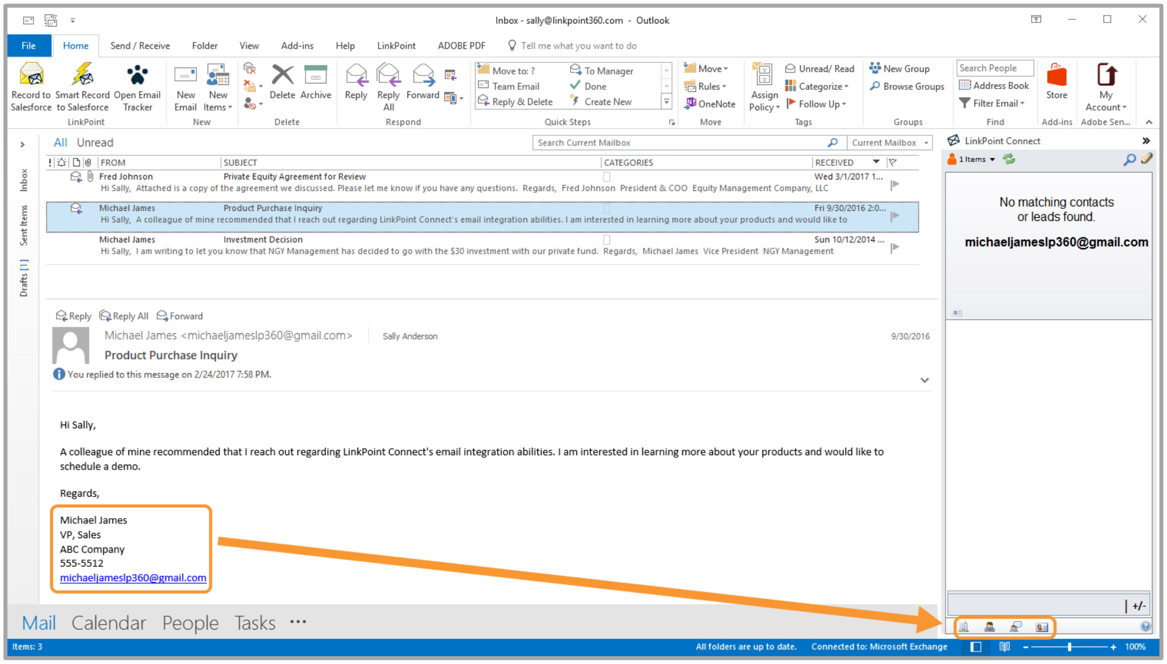
4

Click the **Apply** button to confirm the selection and click the **Ok** button to finish and exit LinkPoint Assist.



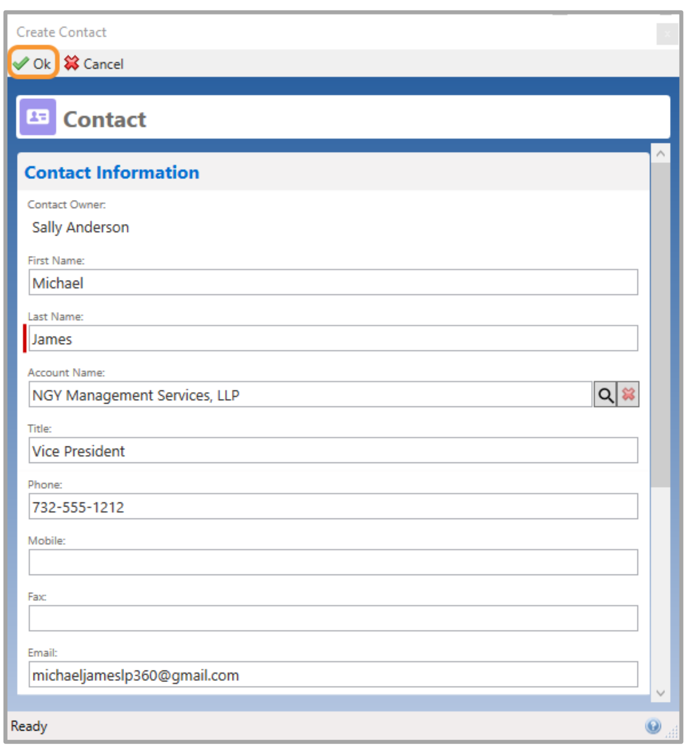
5

Locate an email from a new Lead or Contact and highlight the signature within the email. Drag and drop the highlighted signature to the **Drop Zone** at the bottom of the Side Panel. Release the selection over an icon to create a new Account, Lead, or Contact.



6

Use the Smart Form to create the record. Click **Ok** when finished to save the new record to Salesforce.

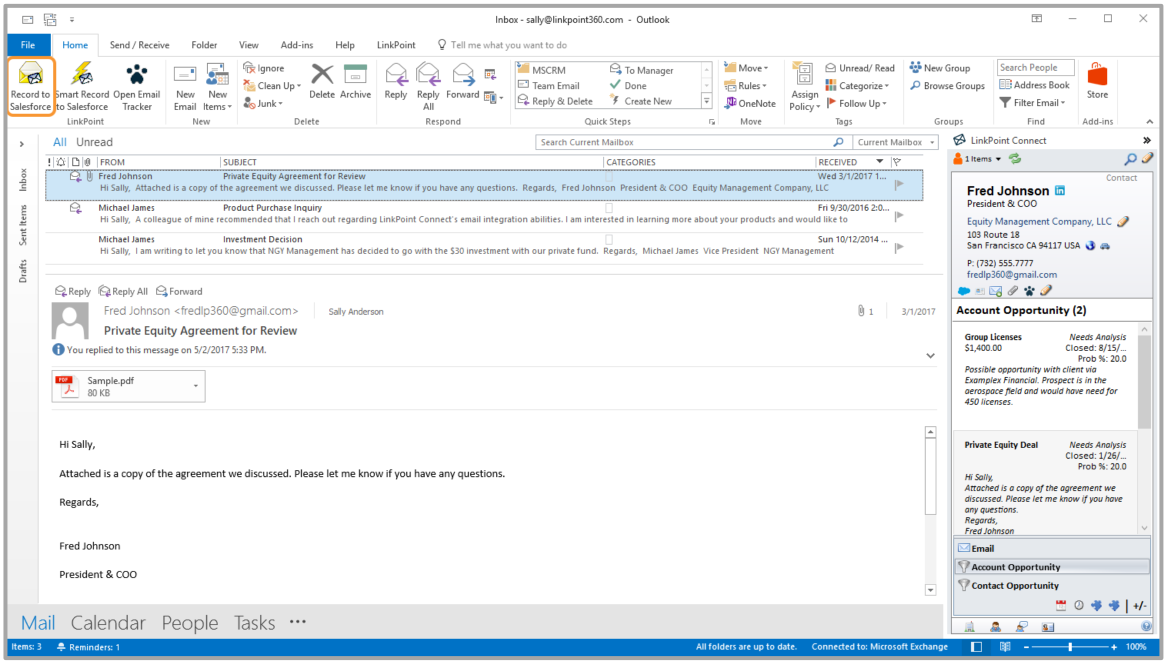


Recording Emails to Salesforce

Recording an Email to Salesforce from Outlook

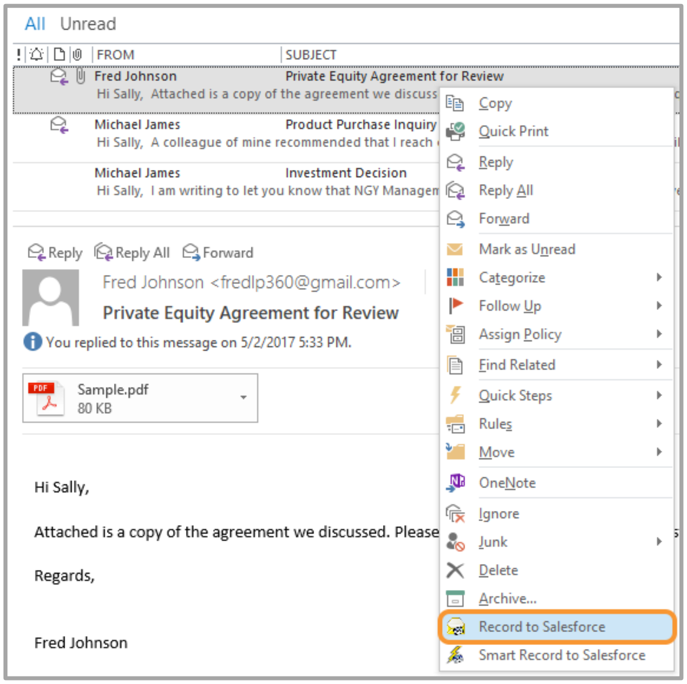
LinkPoint Connect users are able to record emails to Salesforce without the hassle of coping and pasting data between systems. Users can leverage a variety of options to select where to record emails and access supporting functions designed to them more productive in Outlook. In this section, you will learn how to record emails to Salesforce from Outlook.

1 Select an email and click the **Record to Salesforce** button in the top left corner of the Outlook Ribbon.

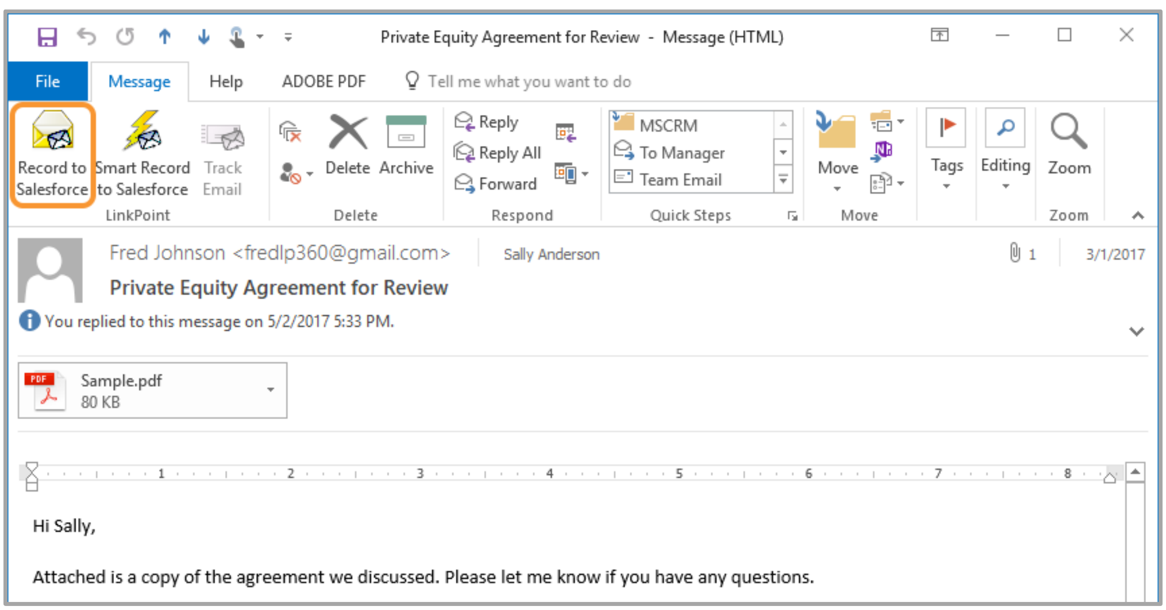


Tip: There are four other ways to access the Record window for LinkPoint Connect.

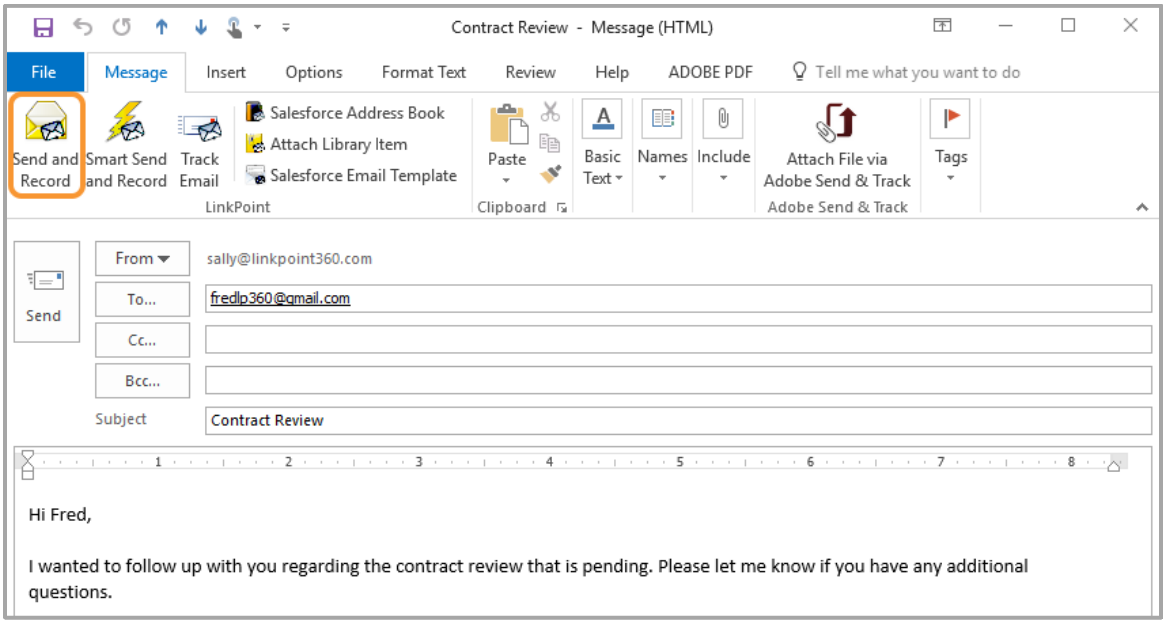
- Right click an email in the inbox and select **Record to Salesforce** from the menu.



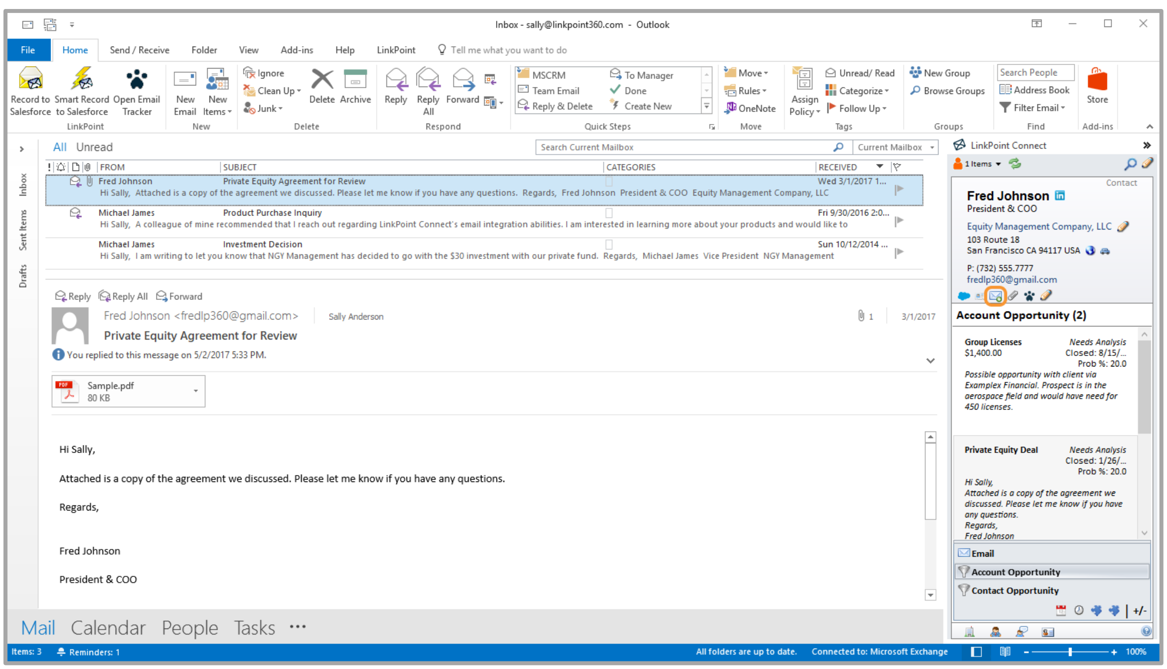
- Within an inbound email, click the **Record to Salesforce** button.



- Within an outbound email, click the **Send and Record** button.



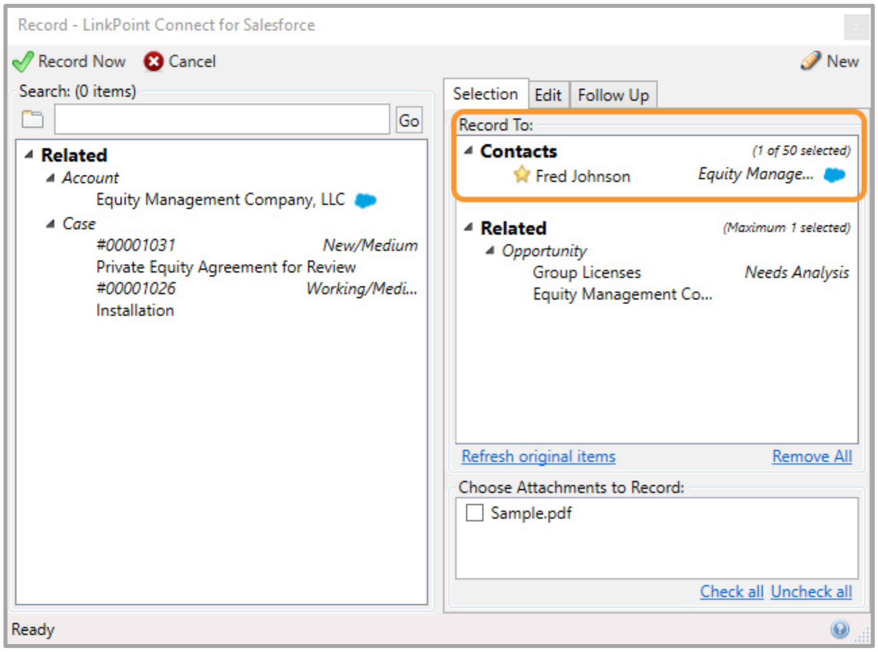
- Select an inbound email and click the **Quick Record the email to this record** icon on the Side Panel to record the email to the sender's record in Salesforce. Note that this method will not record attachments.



Tip: If you select more than one email in your inbox and then follow the steps to record, the same criteria will be used to record all of the selected emails.

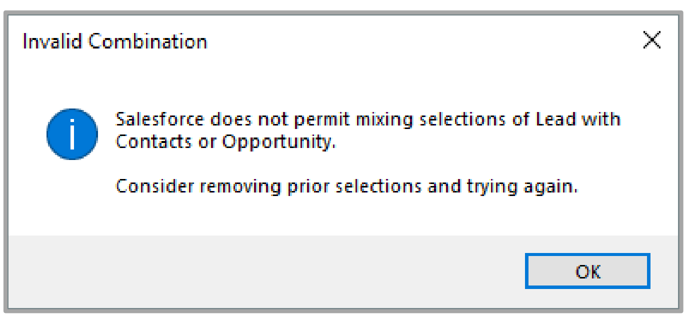
2

Choose the items to record the email to within the **Selection** tab in the **Record** window. Review the suggested Contacts displayed in the **Record To:** section.



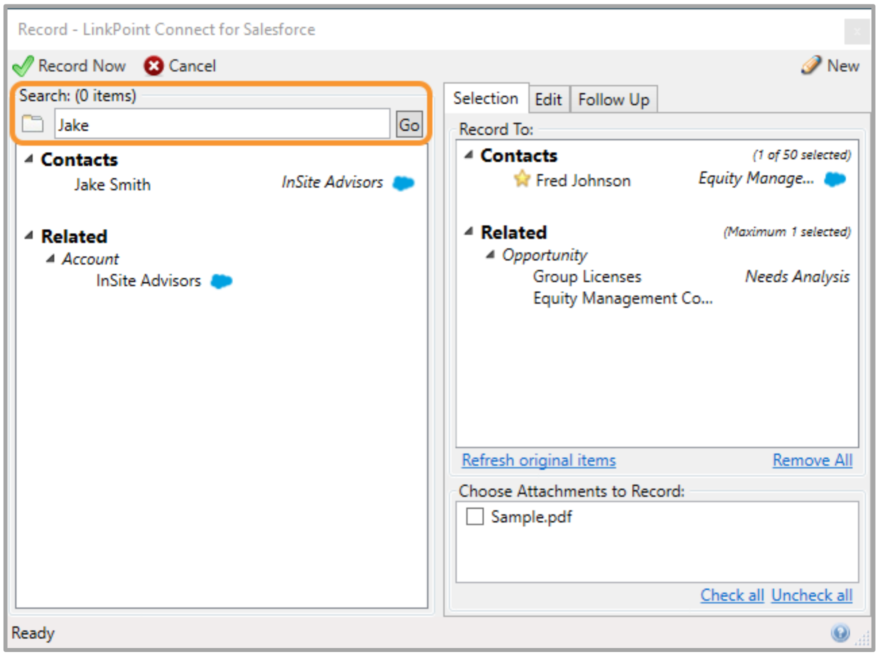
Tip: LinkPoint Connect automatically suggests Contacts and Leads that exist n Salesforce if they are included in the To, From, Cc, or Bcc fields of the email. If there are no matching Contacts or Leads in Salesforce, the Record To section will not display any suggestions.

Warning: Salesforce does not allow users to take action on Contacts and Leads at the same time. Try selecting only Contacts or only Leads and record the email.

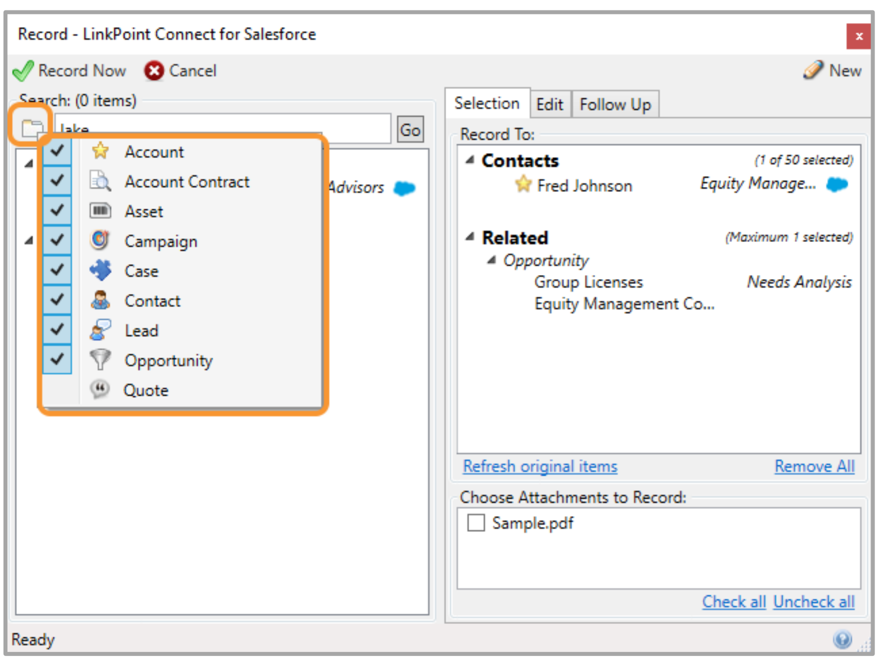


3

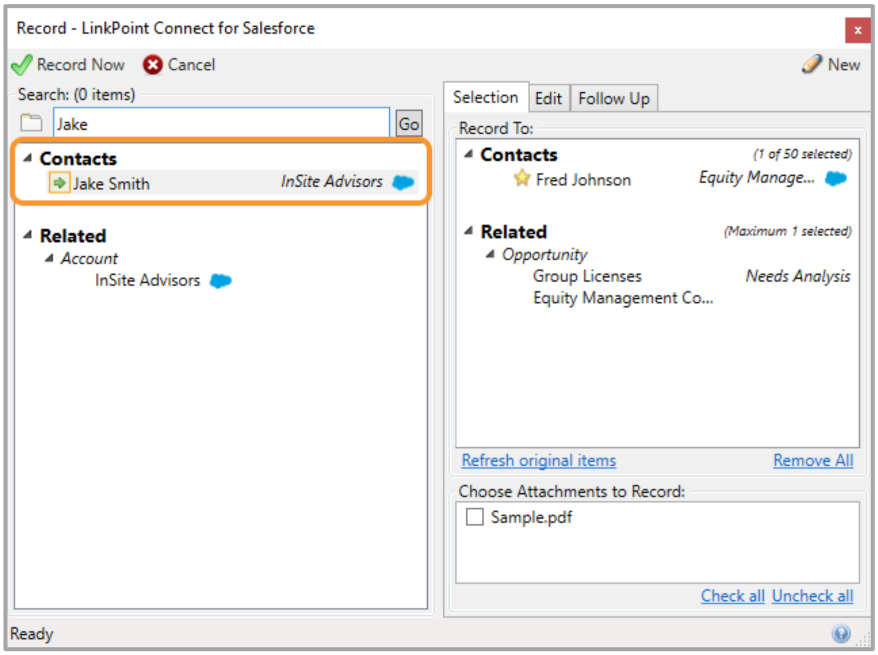
Enter text in the Search field and click **Go** to search for additional records.



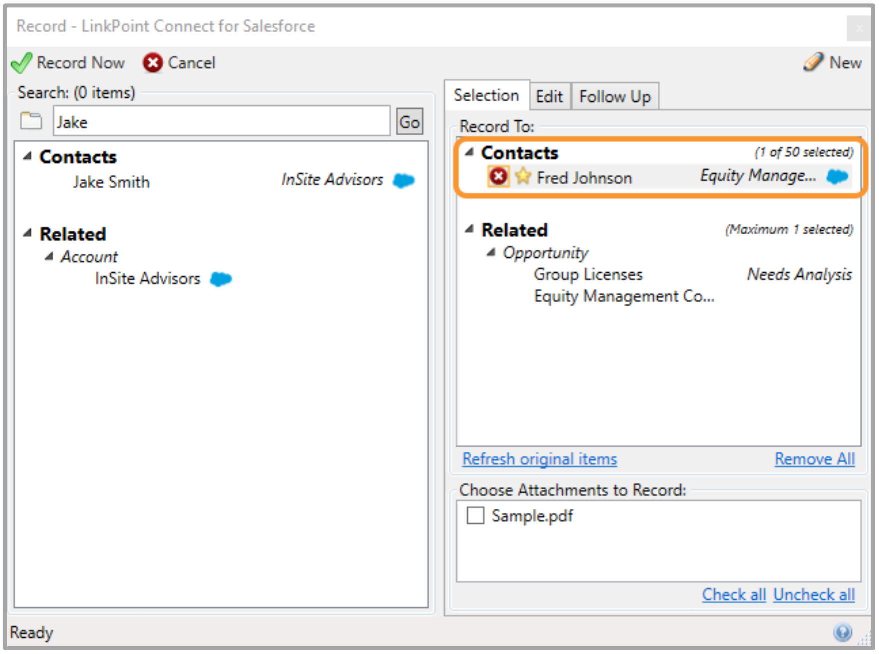
Tip: Click the folder icon to the left of the Search bar in the Record window. You can select the object types to include in the Search results as options for recording.



4 Review the Search results. Mouse over and click the **green arrow** to add the Contact to the **Record To** list.



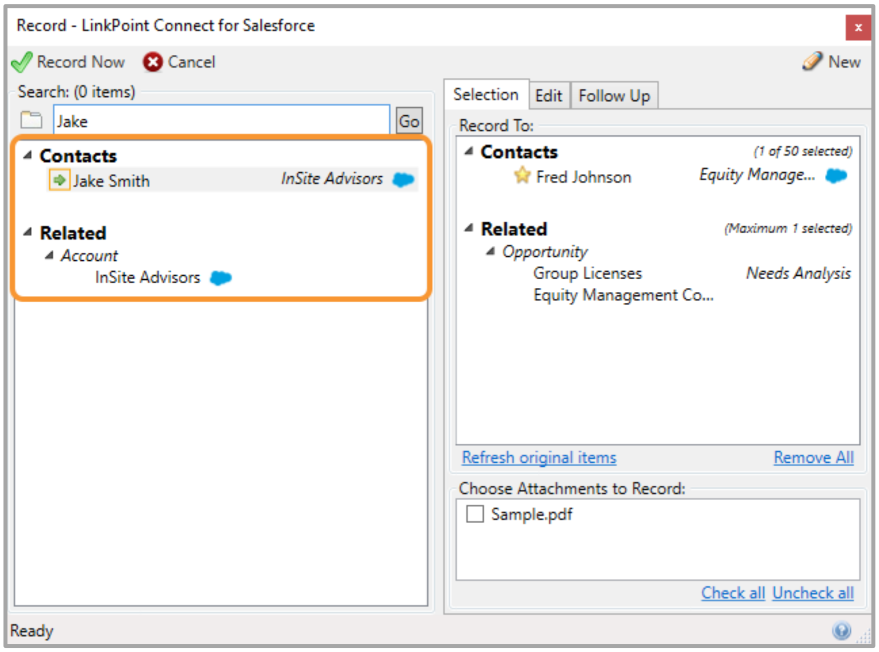
5 Mouse over an item in the **Record To** list and click the **red x** icon to remove it from the list. Note that the removed item will appear on the left side of the Record window.



Tip: You can also double click on an item to add or remove it from the Record To section.

6

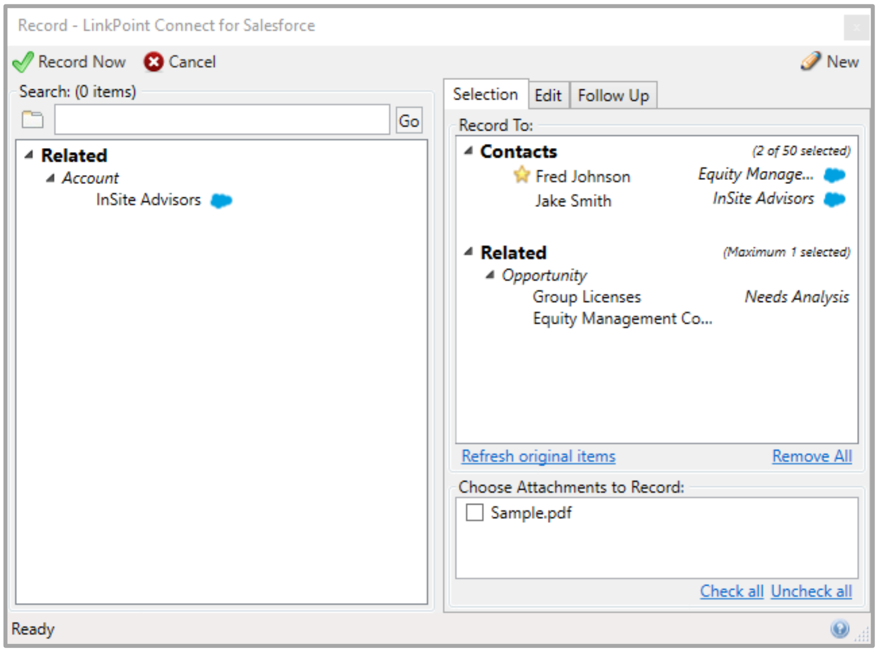
Select additional items to record the email to from the **Related** list on the left side of the **Record** window.



Tip: Salesforce does not allow users to take action on more than one related record type at the same time. Try selecting only one record type to record the email.

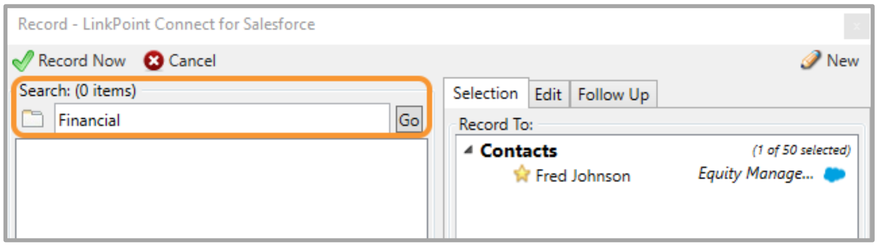
7

Enter text in the search field and click **Go** to search for additional records. Review the search results list, mouse over an item, and click the **green arrow** to add the contact to the **Record To** list.

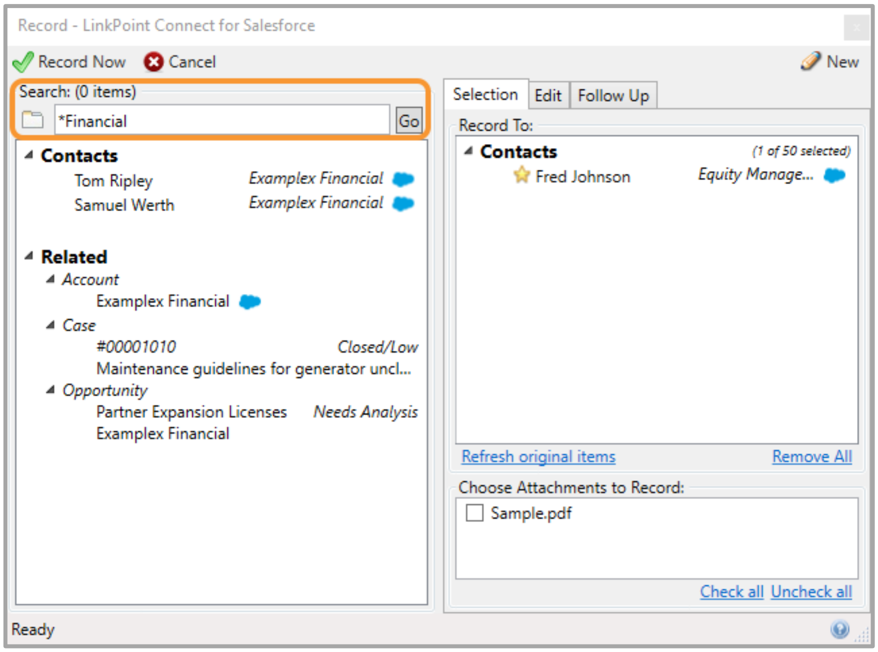


Tip: By default, LinkPoint Connect is configured to search based on *Starts with* logic in the Record window. Users can add either ***** or **%** at the start of the search term to perform a *Contains* search.

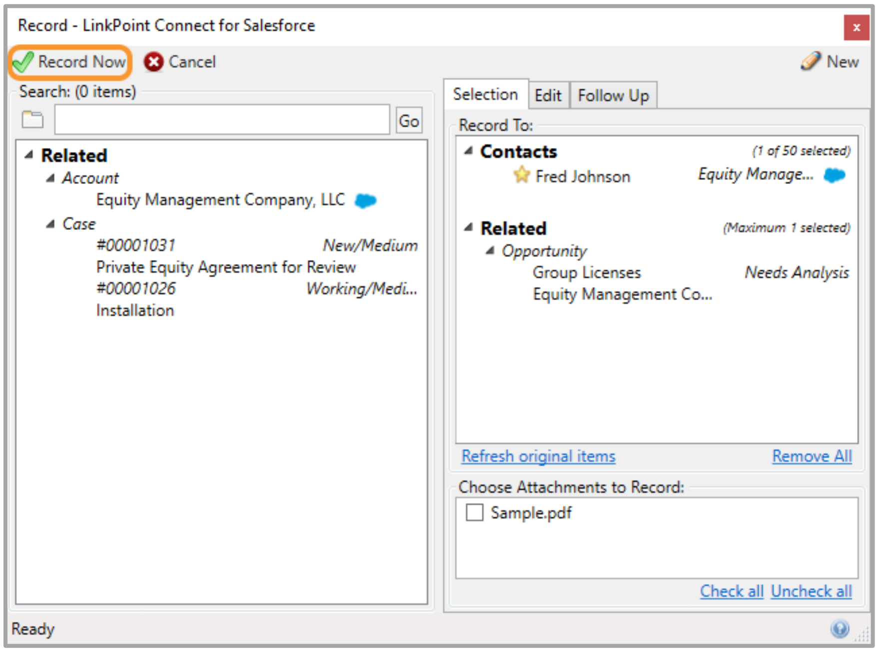
Example: In this example, we want to record an email to an Account record. We search for the record using the word *Financial* because we remember the name of the Account has the word *Financial* in it. However, the Account does not appear in the results because *Financial* is not the first word of the Account name.



To find the right Account, we search for **Financial*. Now the search returns results for *Examplex Financial*, which is the Account we wanted. Now we can proceed with adding the related items to the Record To section.



8 Click the **Record Now** button to record and send the email, or continue to work with the record options in the next section of this User Guide.



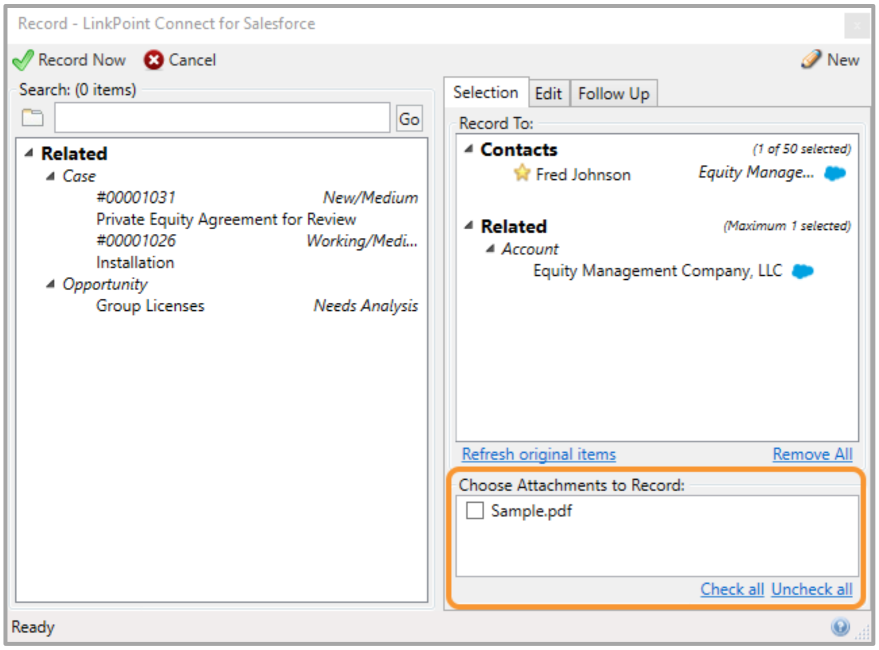
Recording Attachments with Emails to Salesforce from Outlook

LinkPoint Connect users are able to record emails to Salesforce without the hassle of coping and pasting data between systems. Users can also work with attachments when recording emails to Salesforce. In this section, you will learn how to record attachments to Salesforce from Outlook.

Tip: Recording attachments works the same for both inbound and outbound emails. However, note that attachments are not recorded when using the **Quick Record the email to this record** icon on the Side Panel.

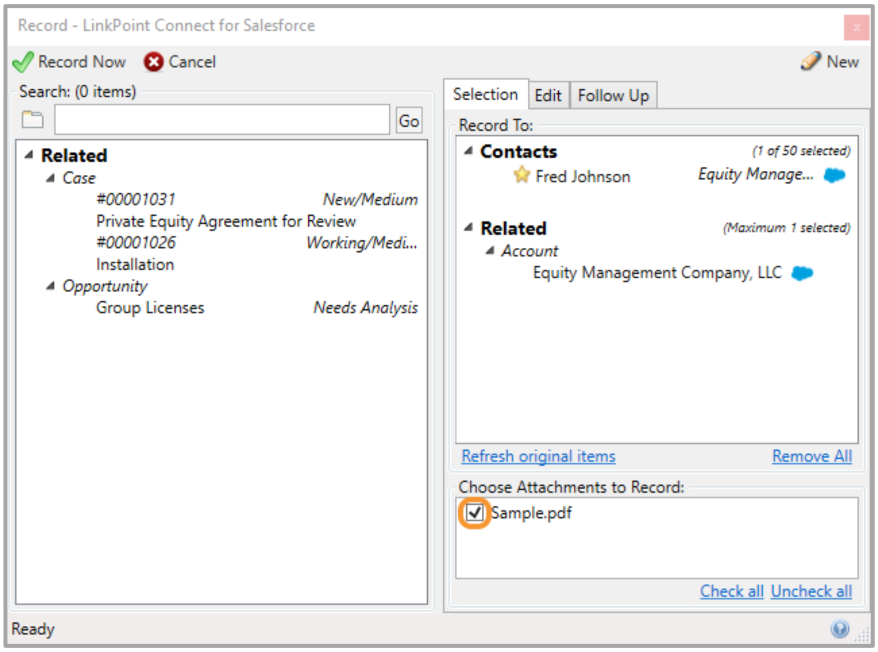
Tip: LinkPoint Connect supports Salesforce instances that use the Files Object for attachments. If you have the Files Object enabled in Salesforce, attachments will record to this object and will be displayed in the page layouts wherever the Files Object has added by your Salesforce administrator. When the Files are recorded, they appear under the Files Related List and a reference is added to the File in the Notes & Attachments Related List. As users continue to record emails and attachments to Salesforce, LinkPoint Connect also retains the associations made by the user. For example, the user can relate the email to a Contact or Account in Salesforce and choose to record the attachment. The recorded File in Salesforce will also display the related items. Organizations not using the Files Object will see attachments within the Notes & Attachments section on the related records.

1. Review the **Choose Attachments to Record** section within the **Record** window.



2

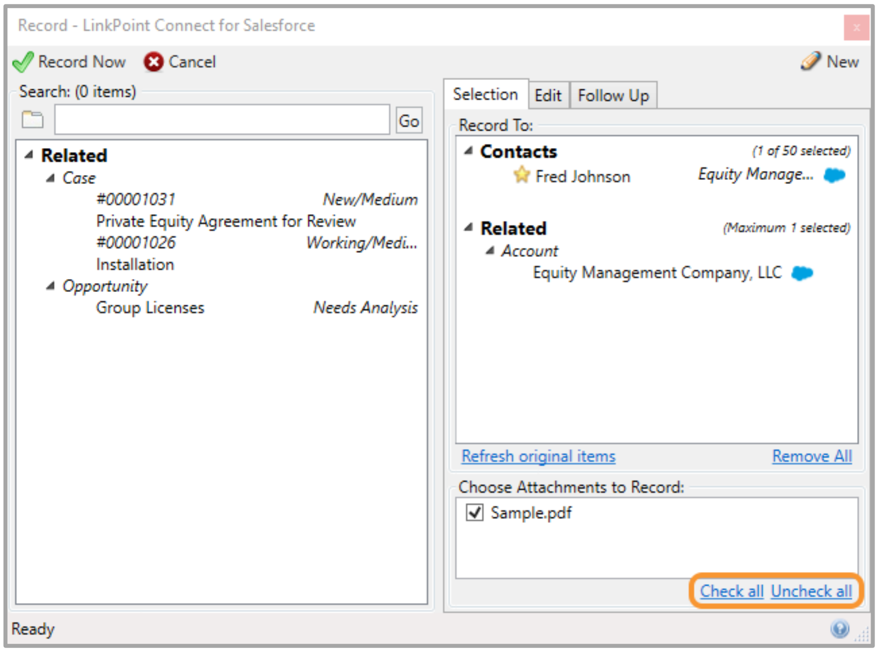
Select the checkbox for each attachment to record along with the email.



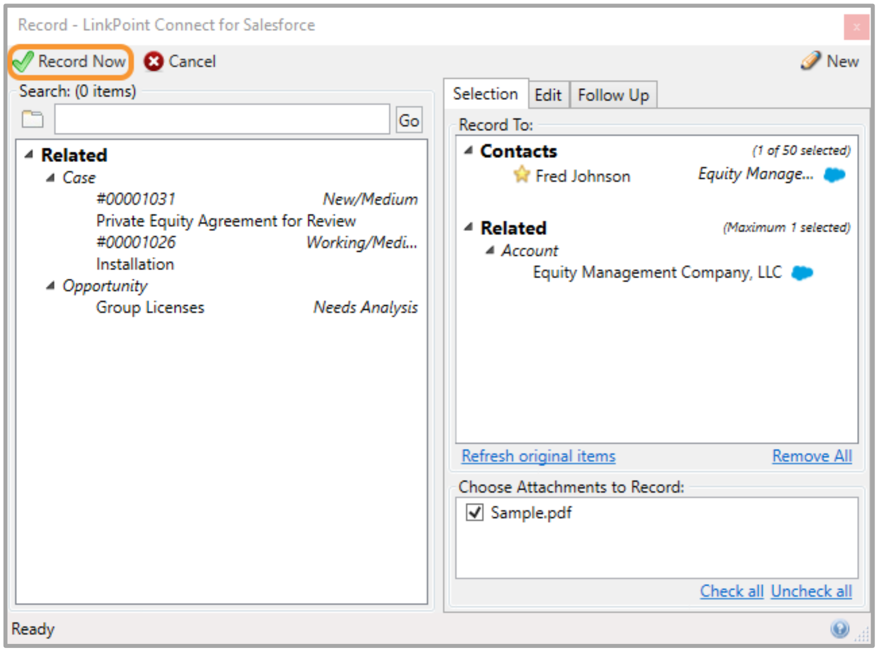
Tip: Attachments are listed but deselected by default. Users can control the items that are recorded to Salesforce. Many emails contain graphics, such as social media icons in email signatures, that do not need to be recorded to Salesforce.

Additional Resource: Refer to the **Configuring LinkPoint Connect Record Functionality** section of this User Guide for more information on configuring default attachment record settings.

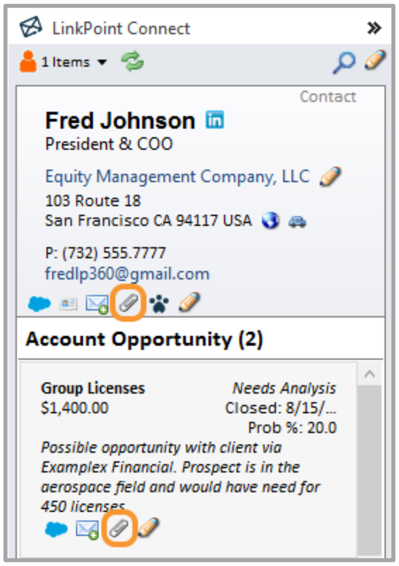
3 Select the **Check all** or **Uncheck all** options to select or deselect all of the attachments in the list.



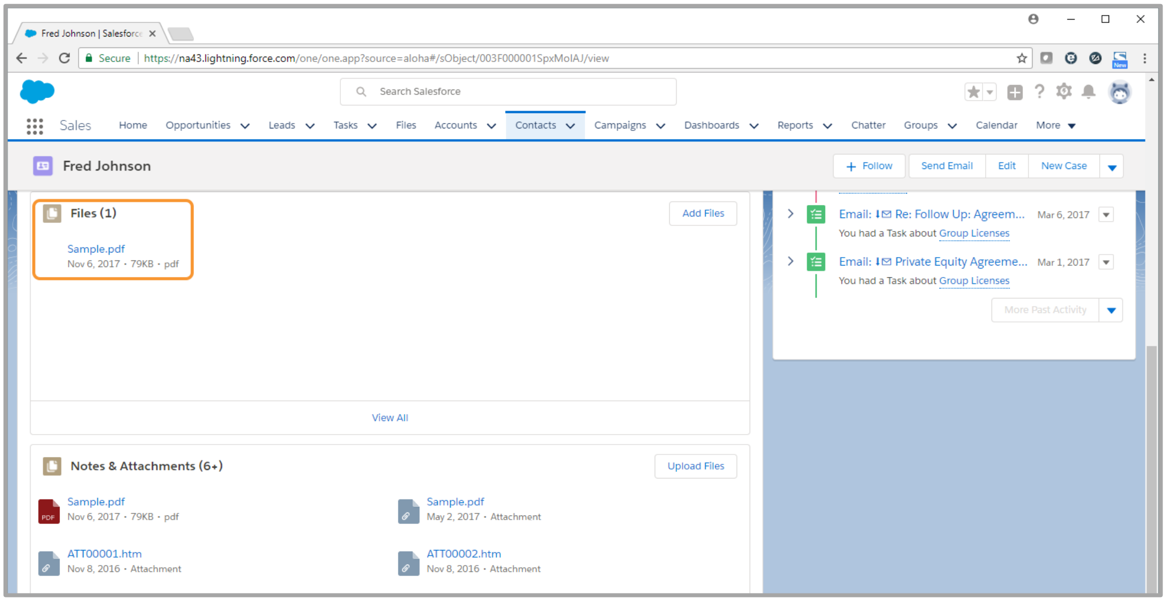
4 Click the **Record Now** button to record and send the email or continue to work with the record options in the next section of this User Guide.



Tip: You can also drag and drop attachments from your email or anywhere on your desktop and release the file on the Attachments icon to record the attachment. If you release the attachment over the Attachments icon on the Business Card, the attachment will be recorded to the Contact or Lead record. If you release the attachment over the Attachments icon on an Opportunity or Case record, the attachment will be recorded to the corresponding record in Salesforce.



5 Locate the related record in Salesforce. Note that the attachment is included in the **Files** section. Click to view the item and the other records that the item is related to.

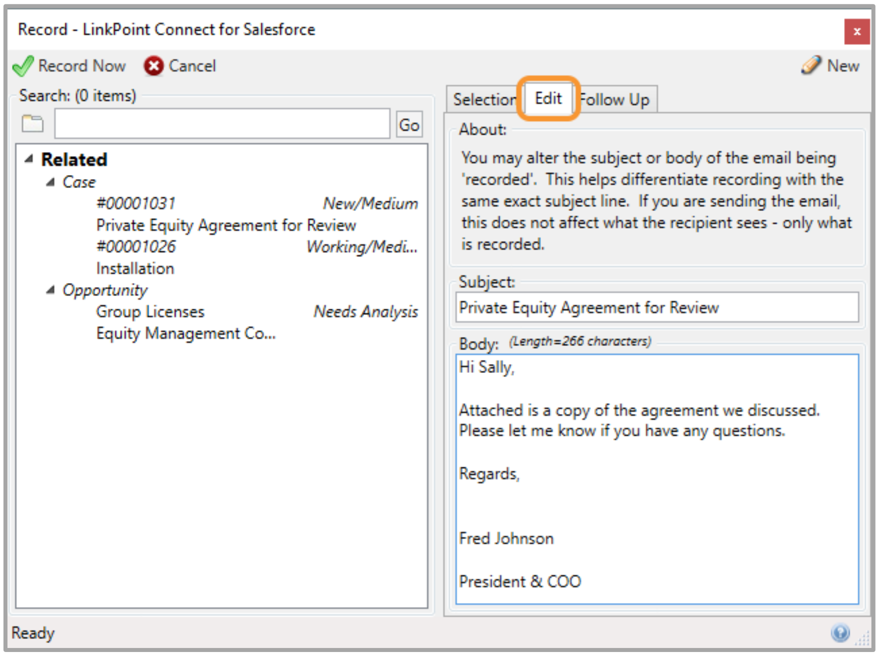


Tip: You may also see the attachment under the Notes & Attachments section of the record. Salesforce will display the Files items under Notes & Attachments for organizations transitioning to the File object. Note that the file has only been recorded once but can be viewed from multiple related tables.

Editing Email Content When Recording to Salesforce from Outlook

LinkPoint Connect users are able to edit the information recorded to Salesforce without altering the message sent to a recipient. This helps users relabel items as part of an email chain with more accurate descriptions for CRM reference. In this section, you will learn how to record emails to Salesforce from Outlook.

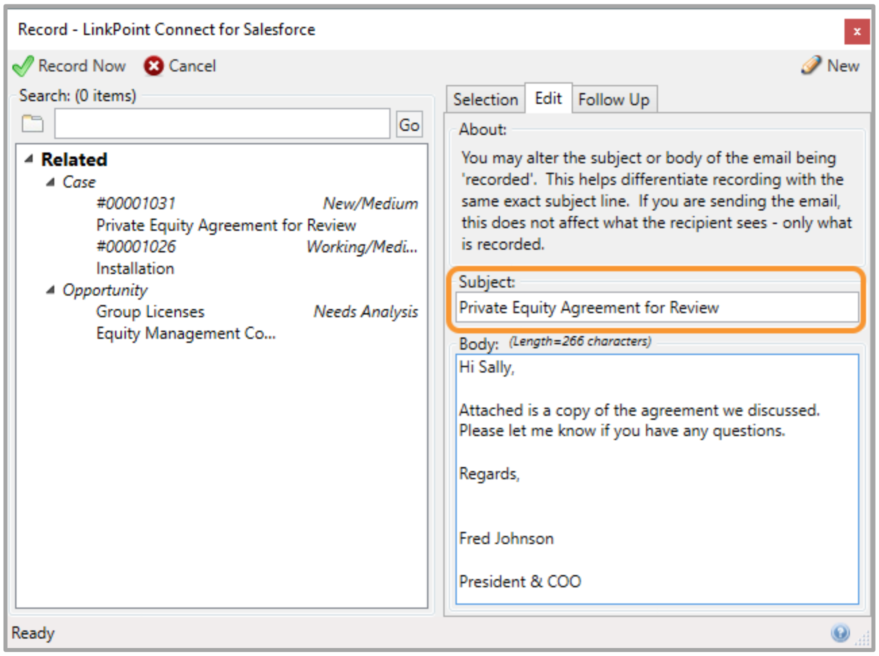
1 Select the **Edit** tab in the **Record** window.



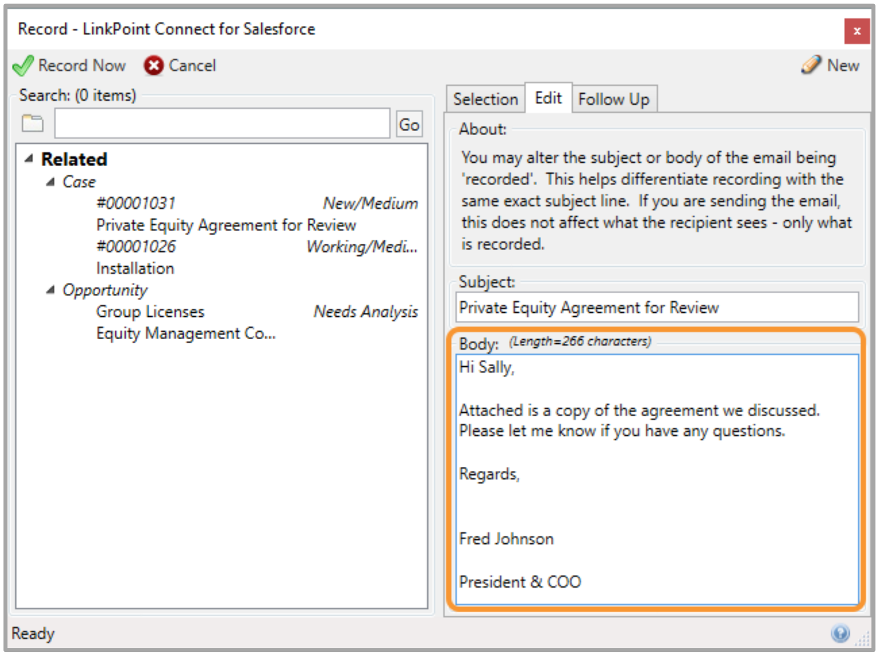
Tip: The Subject and Body fields automatically populate with the existing subject and body of the email. Users can alter the Subject of the email to change how it will appear within Salesforce to help differentiate it from other recorded emails with the same subject line. Users can edit the Body of the email to eliminate redundant information especially when an email chain has been recorded several times.

Tip: Changing content within the Edit tab does not change the content that the email recipient(s) see. These changes only affect the content that is recorded to Salesforce.

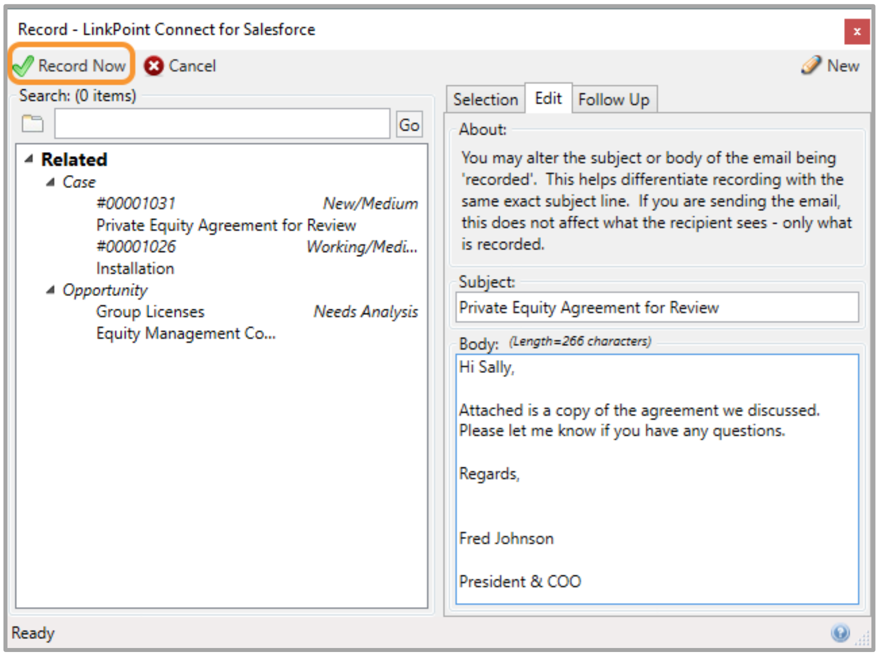
2 Enter or edit the text in the **Subject:** field.



3 Enter or edit the text in the **Body:** field.



4 Click the **Record Now** button to record and send the email, or continue to work with the record options in the next section of this User Guide.

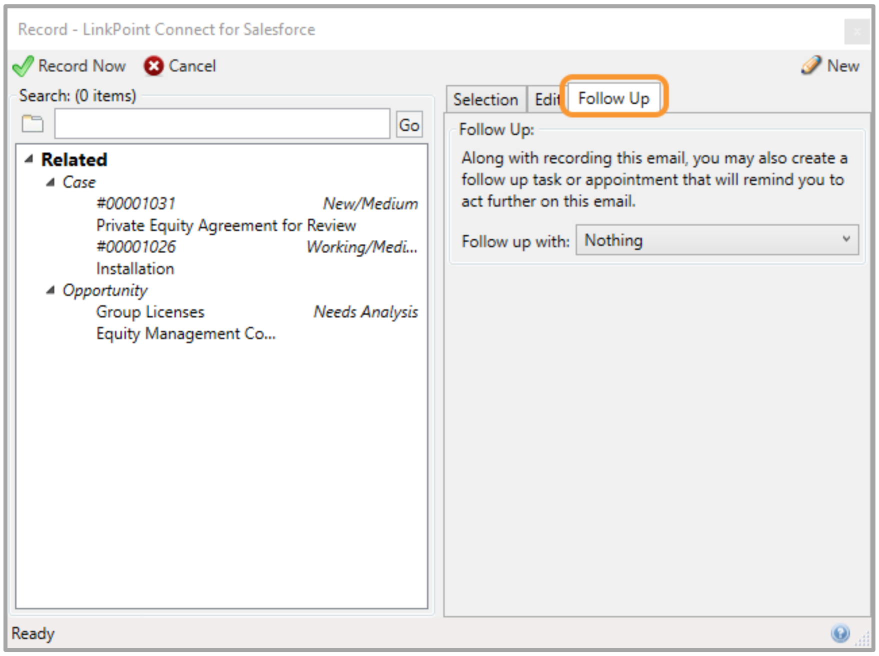


Scheduling Follow Up Actions When Recording an Email

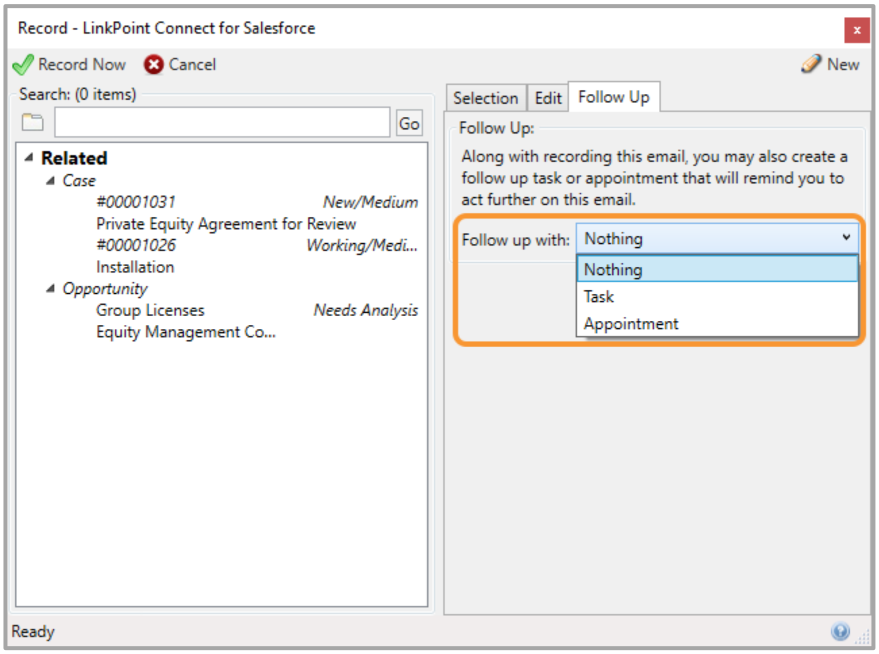
LinkPoint Connect users are able to create follow up Tasks for themselves or team members when recording an email. This helps users capture next steps with a prospect or customer while working with the communication. In this section, you will learn how to create a follow-up action as part of the email recording process.

Example: In this example, we will schedule a follow up Task. The process is similar for scheduling Appointments. Tasks are typically chosen if the action is to be completed by a single individual. Appointments are typically chosen if the action includes other participants.

1 Select the **Follow Up** tab in the **Record** window.

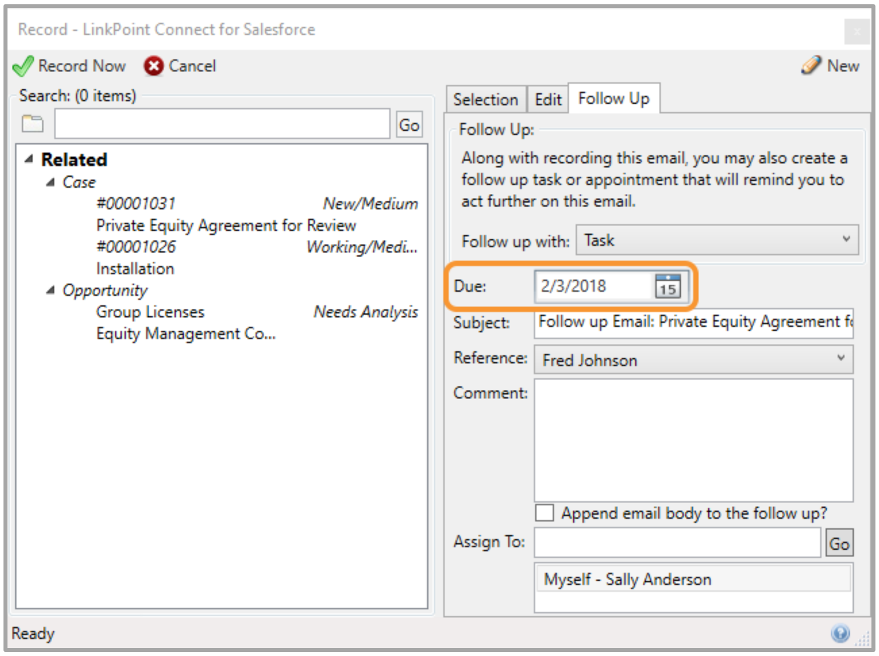


2 Select an option from the **Follow up with** drop-down list to create either a **Task** or **Appointment**.

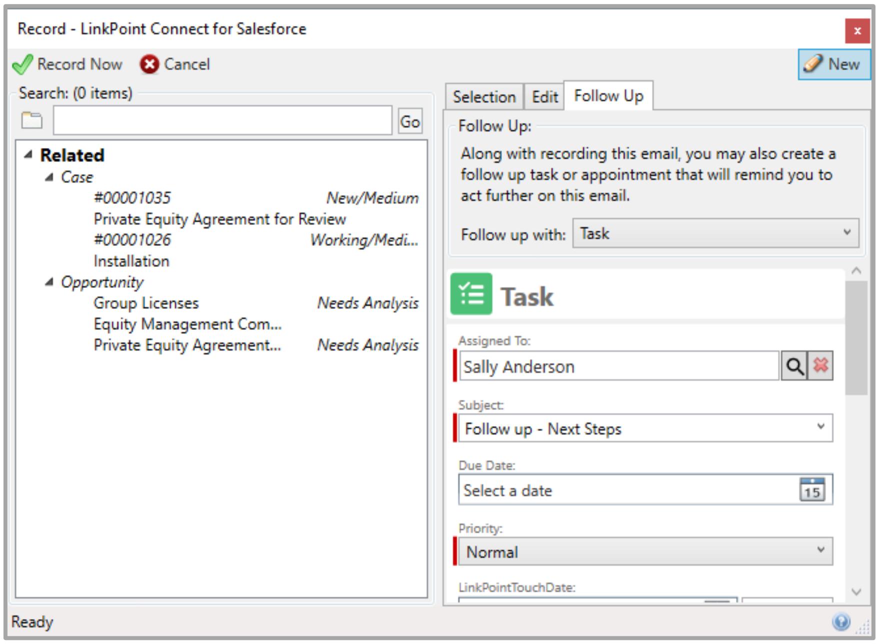


Tip: Follow up options are off by default, and the option for **Nothing** is selected by default. Items will not be added to your Calendar or Task list unless you enable and schedule the follow up manually.

3 Enter the necessary details in the **Due** field to note when the Task should be completed.

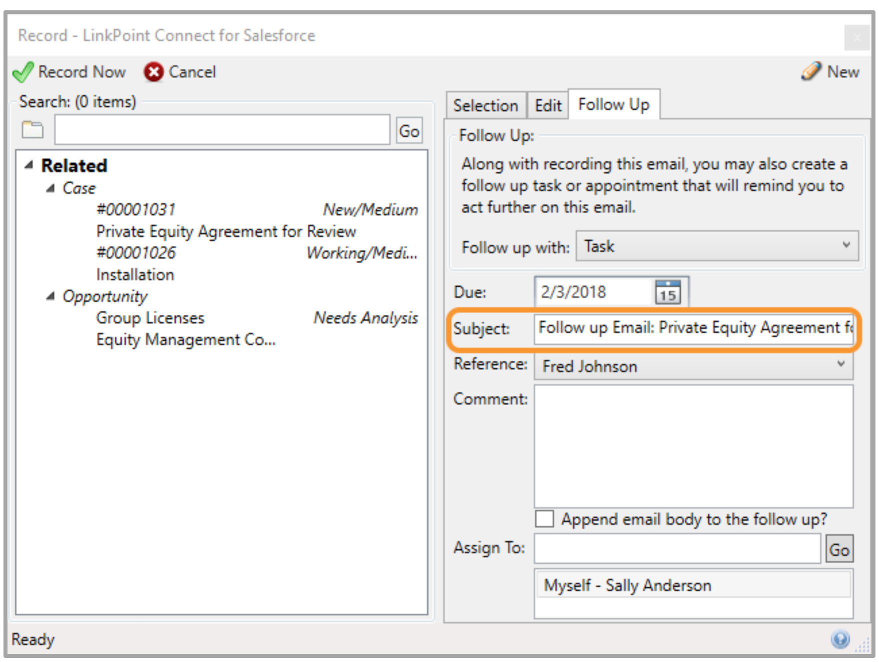


Tip: Users with Smart Forms enabled for the Follow Up Task or Event option within the Record window will see a different layout for the follow up item.



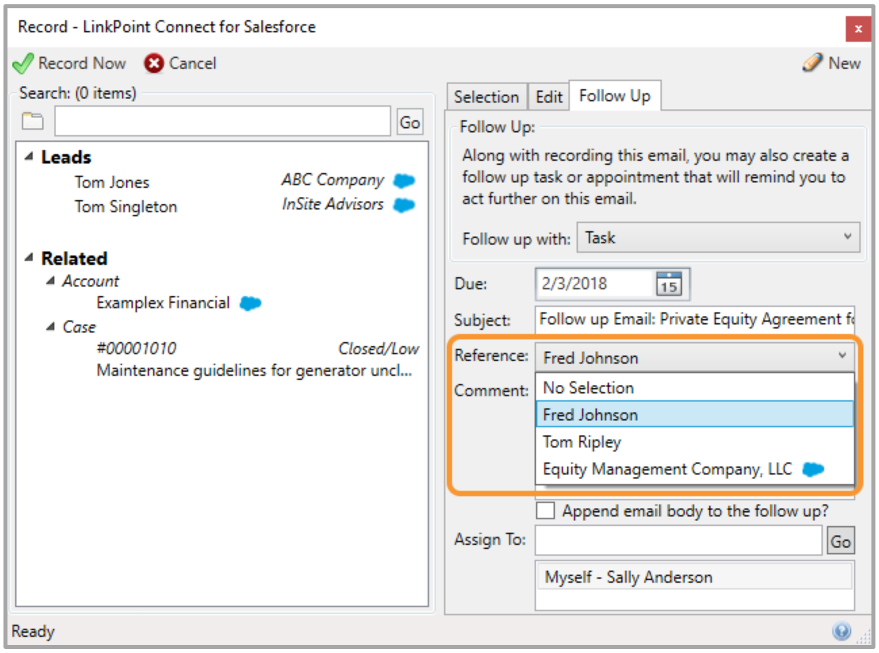
Additional Resources: Refer to the **Configuring Smart Forms** section of this User Guide for more information.

4 Review the content in the **Subject** field and make any necessary changes. This will name the Task on your Task List. Note that LinkPoint Connect pre-populates this field with *Follow up Email:* followed by the Subject.



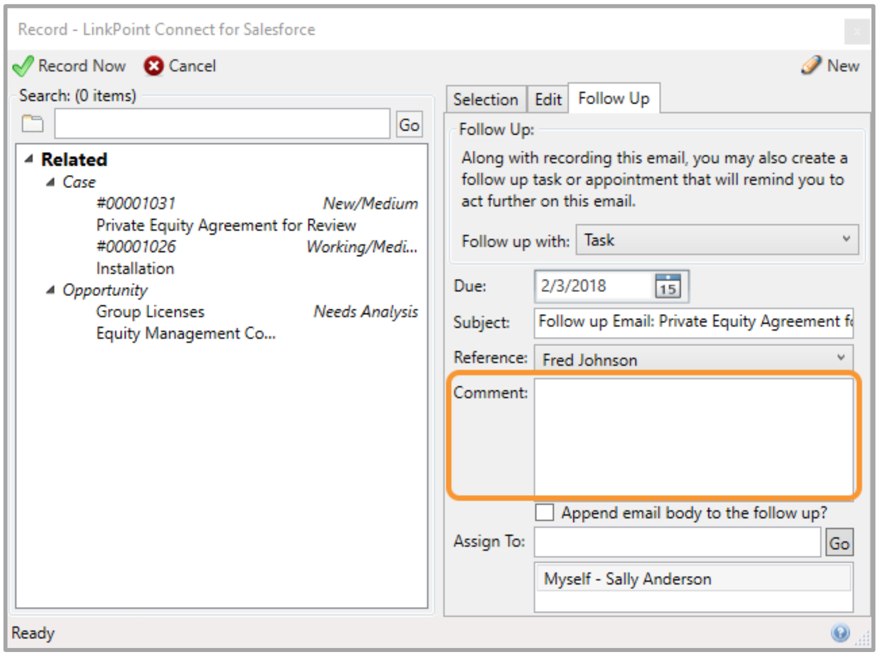
Tip: Changing the Subject for a scheduled Task or Appointment can make it easier to find when looking at the item in your calendar or task list at a later date. Often with back and forth communication, the same subject line is reused. Changing this field will not change how the actual email subject line is displayed to the recipient.

5 Select the Contact or Lead to associate the Task with from the **Reference** drop-down list. This list will include any related Contacts that were added to the Selection tab within the Record window.

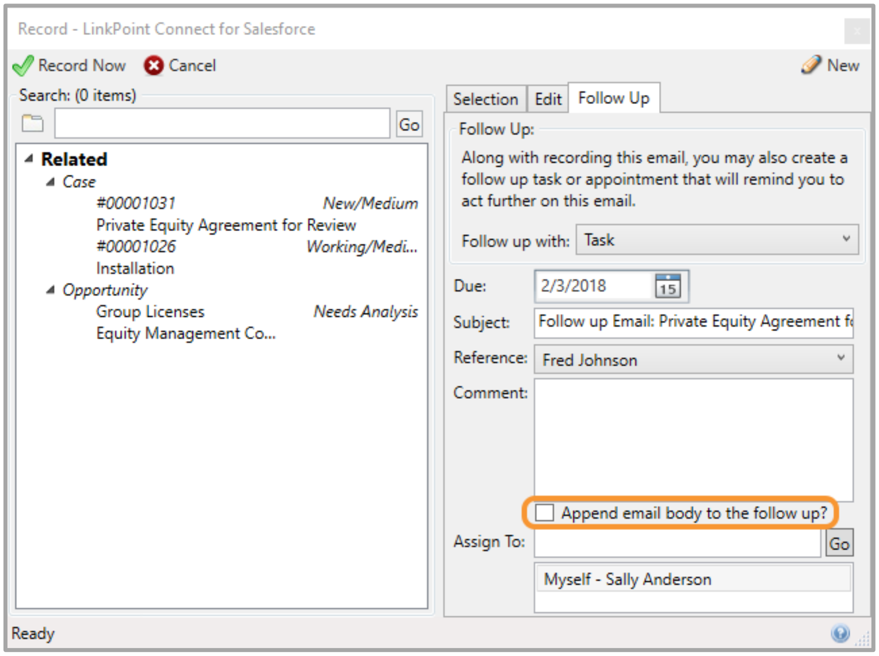


Tip: Selecting a Contact to include in the Reference field simply associates the Task with their record in Salesforce. It does not send a Task or Appointment invitation to the individual.

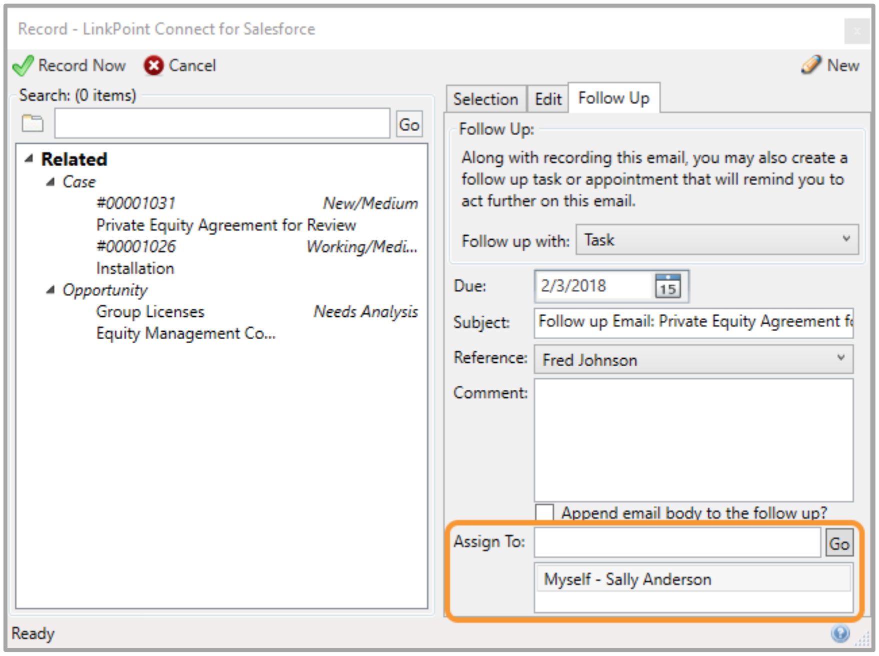
6 Enter notes regarding the Task in the **Comment** field. Select **Append email body to the follow up?** to include the content of the email with the Task.



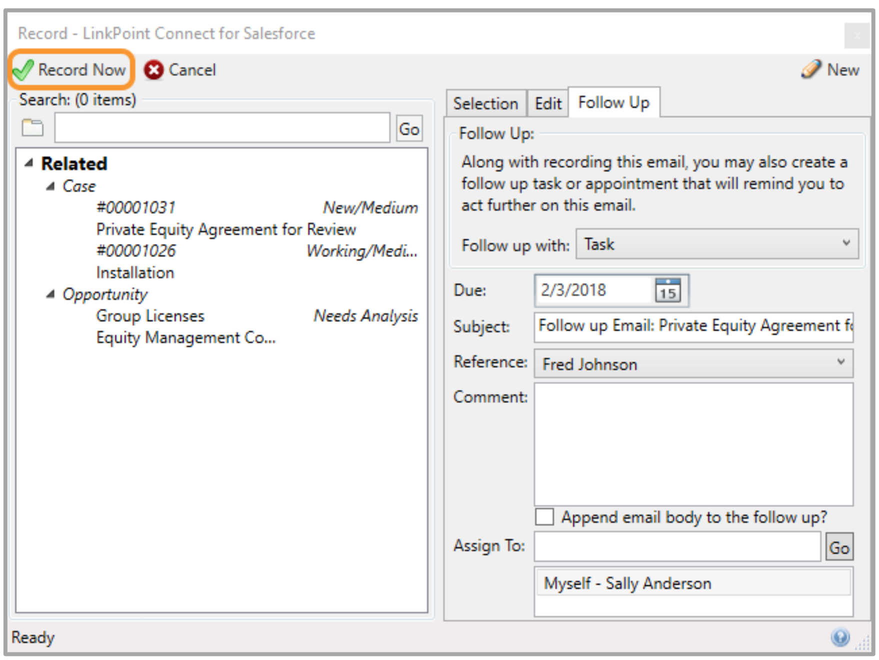
7 Select the checkbox for **Append email body to the follow up?** to include a copy of the original email text to the Task or Appointment you are creating.



8 Set the Task owner in the **Assign To** field. The default is your own Salesforce profile. Search the **Assign To** field for any member of your team by entering their first or last name. This option is only available for Task creation (not Appointment creation).



9 Click the **Record Now** button to record and send the email.

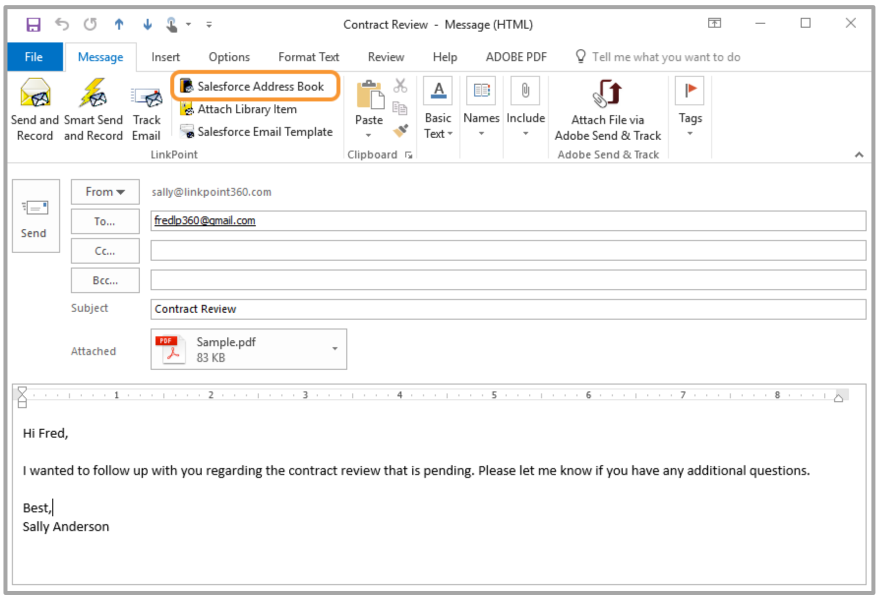


Tip: The newly created follow up item (i.e. Appointment or Task) is created within Salesforce and saved to your Salesforce calendar or task list (or a team member's task list if assigning to another user) as part of the Record process. Depending on your LinkPoint Connect Sync settings, the Salesforce calendar item or task will sync with your Microsoft Outlook calendar and task list.

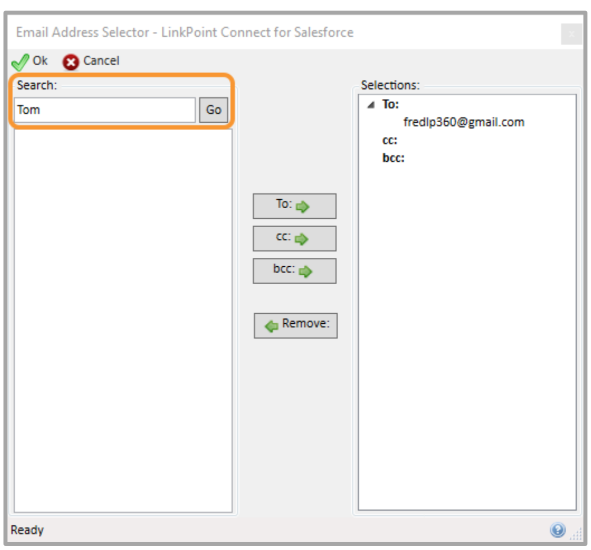
Adding Salesforce Contacts as Email Recipients in Outlook

LinkPoint Connect provides unique functionality that gives users access to use their Salesforce data without leaving Outlook. When creating a new email, sending a reply, or forwarding communication, users can easily access their existing Salesforce contacts directly within Outlook to include additional recipients. In this section, you will learn how to access and use your Salesforce Contacts when working with outbound emails.

1 Open an outgoing email and click the **Salesforce Address Book** button on the Microsoft Outlook ribbon.



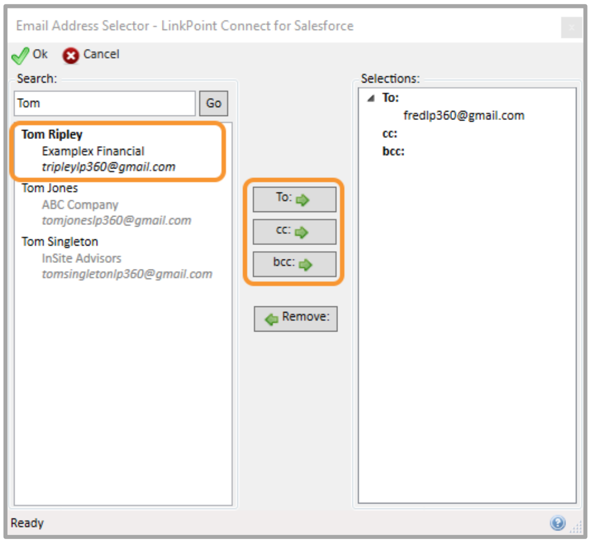
2 Search for Salesforce Contacts by entering a full or partial contact name, account name, or email address in the **Search** field and click the **Go** button.



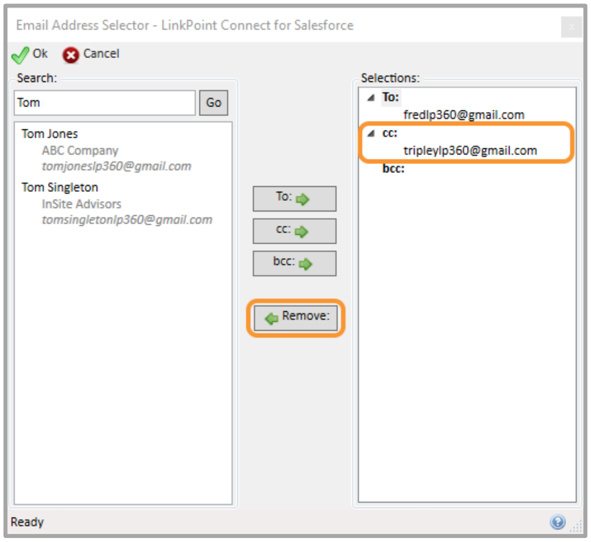
Tip: Any Contacts already included in the To, Cc, or Bcc fields of the email will automatically appear within the Selections pane of the Email Address Selector window.

Additional Resources: By default, LinkPoint Connect searches for Salesforce Address Book Contacts based on Account Name, First Name, Last Name, or Email Address. LinkPoint360 can customize the Search Bar to include results from custom fields. Please contact the LinkPoint360 Support Team for more information.

3 Select the relevant Contact and click the **To:**, **cc:**, or **bcc:** buttons to add the Contact as a recipient.



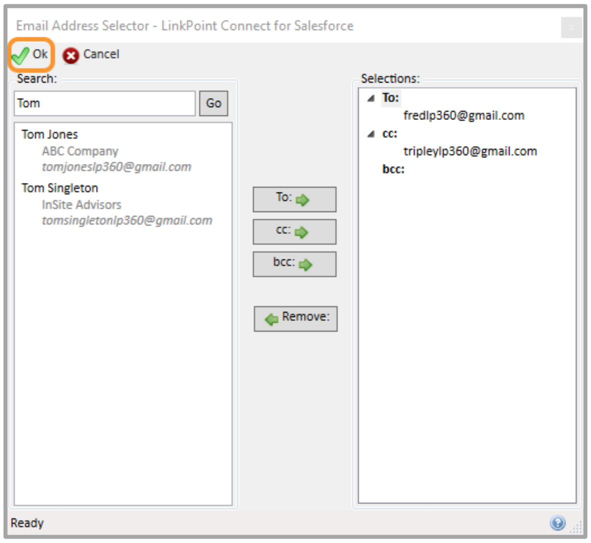
4 Select a Contact in the Selections pane and click the **Remove** button to remove them from the recipient list.



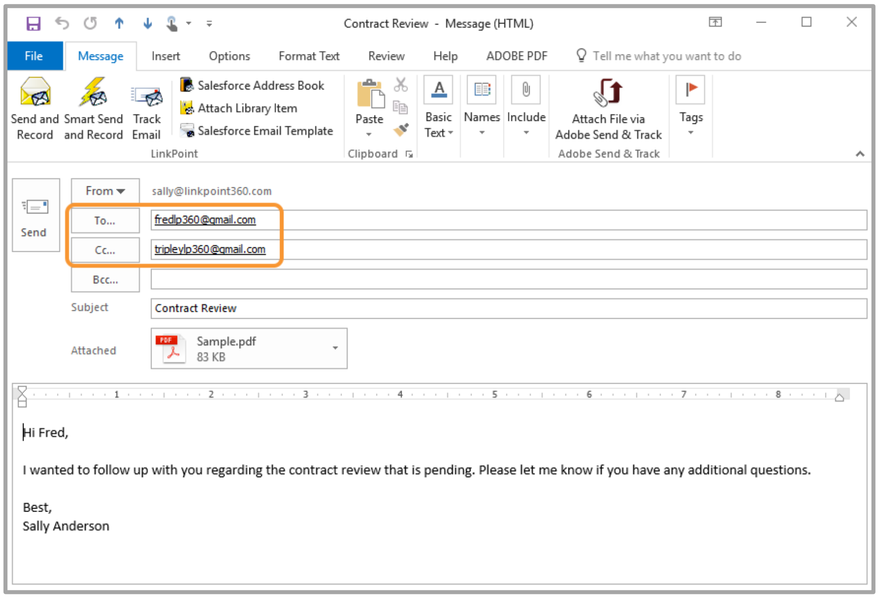
Tip: Double click a contact in either the Search or Selection pane to quickly move it from one side to the other. Double clicking a search item will add it as a To: contact in the Selection pane.

5 Add any additional Contacts based on your search criteria. Note that all Salesforce Contacts and Leads that match your search *and* have an email address will be displayed.

6 Click the **Ok** button to confirm the Selections.



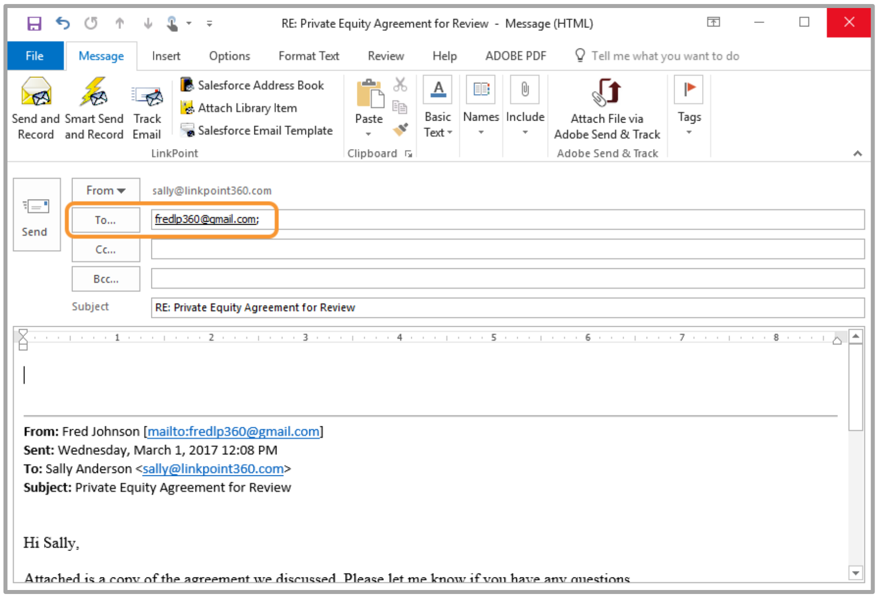
7 Note that the selections have been added to the corresponding fields within the outbound email. Finalize and send the email as you normally would.



Using Salesforce Email Templates in Outlook

LinkPoint Connect users can access Salesforce email templates from within Microsoft Outlook. Users can select a template and then include Salesforce data specific to a Contact, Lead, or other record to merge into the template's fields in both the subject line and body of the email. In this section, you will learn how to work with Salesforce email templates in Outlook.

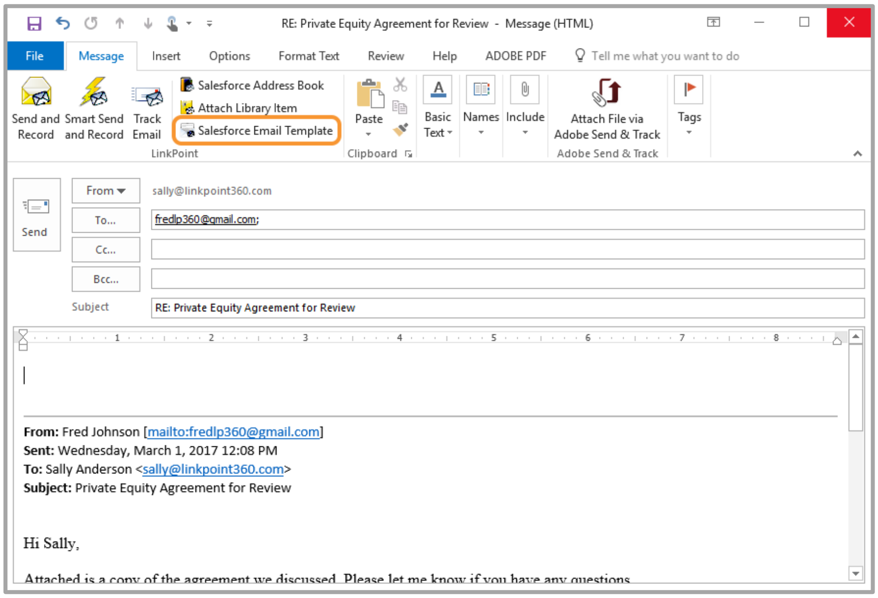
1 Create an outbound email and enter the recipient(s) of the email if there are no recipients already populated.



Tip: You can move forward without entering recipients, but you will have more manual data selection to do when choosing the email template later in the process.

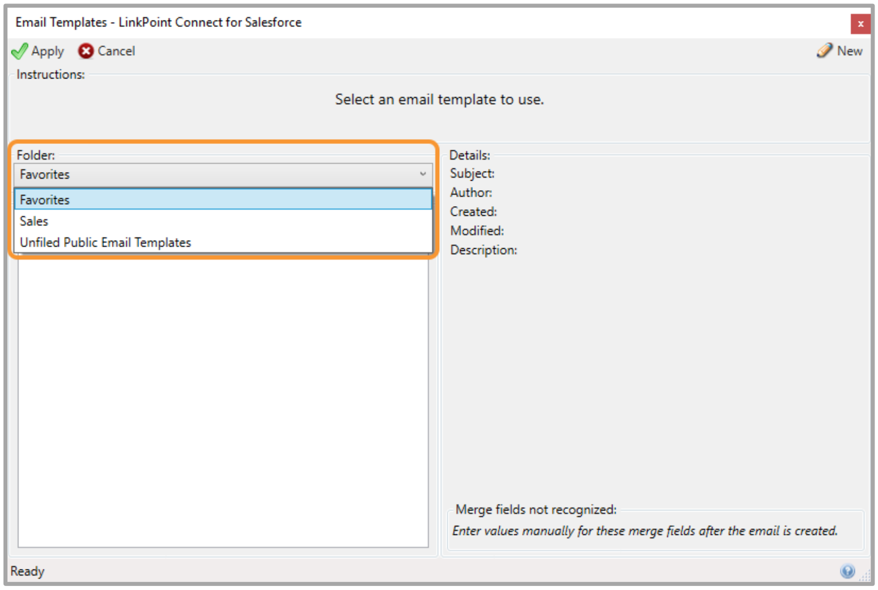
2

Click the **Salesforce Email Template** button on the Microsoft Outlook Ribbon.



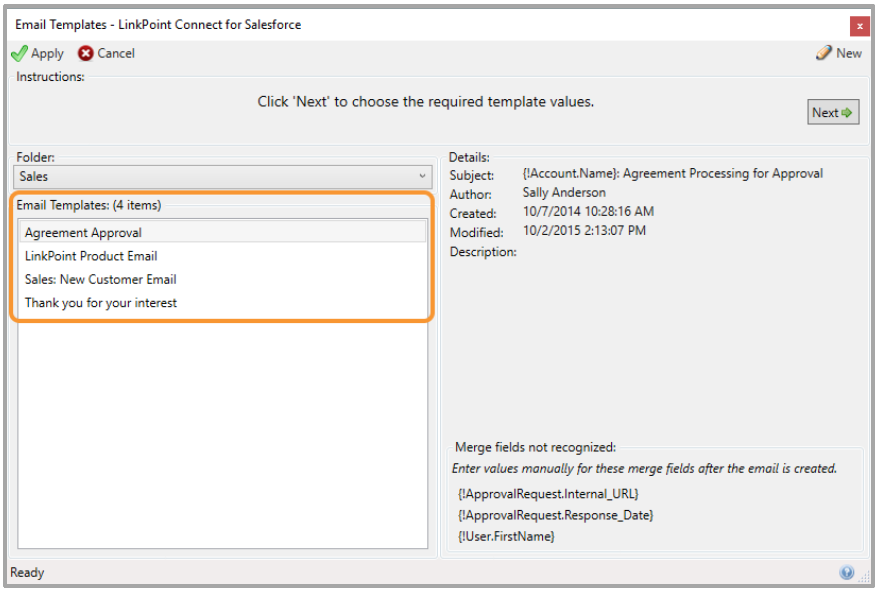
3

Select a folder from the **Folder** drop-down list. This list mirrors the way that your email templates are organized within Salesforce.

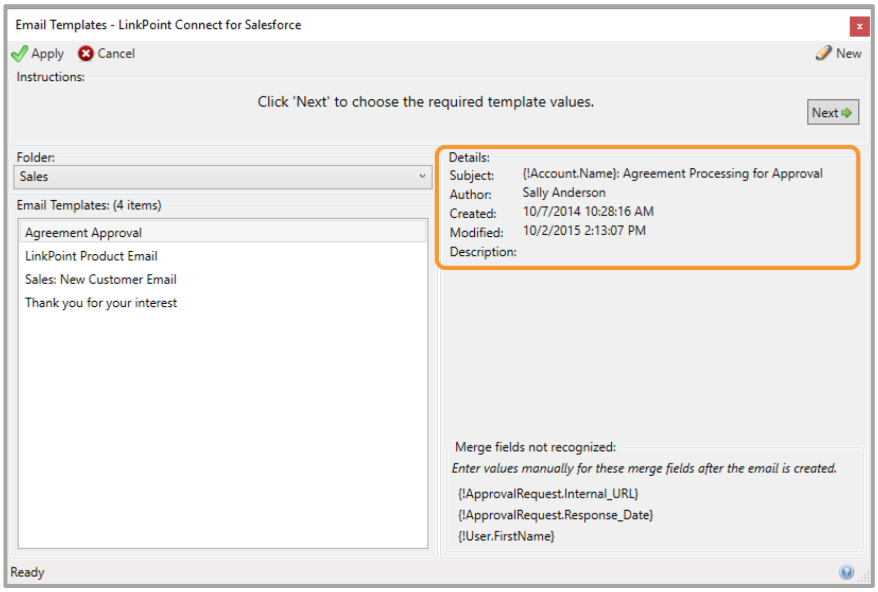


Tip: LinkPoint Connect will store a list of recently used email templates under the folder **Favorites** for you to return to frequently used templates.

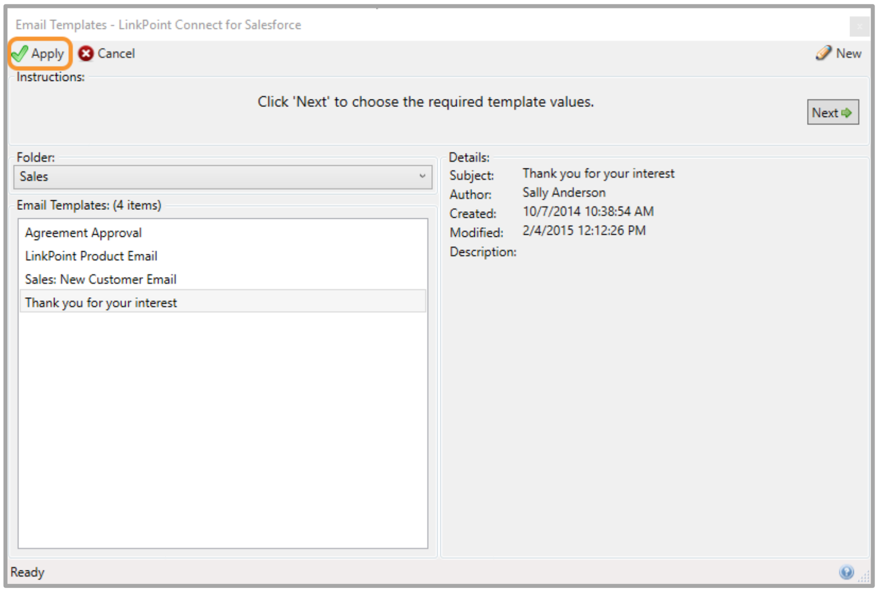
4 Select an email from the **Email Templates** list.



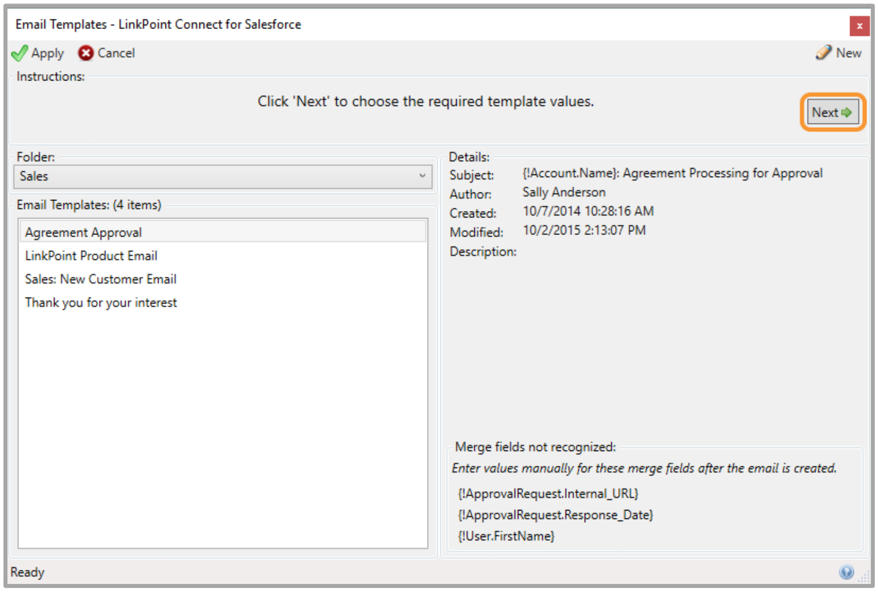
Tip: You can view additional information about each template on the right side of the Salesforce Email Templates window in the **Details** section.



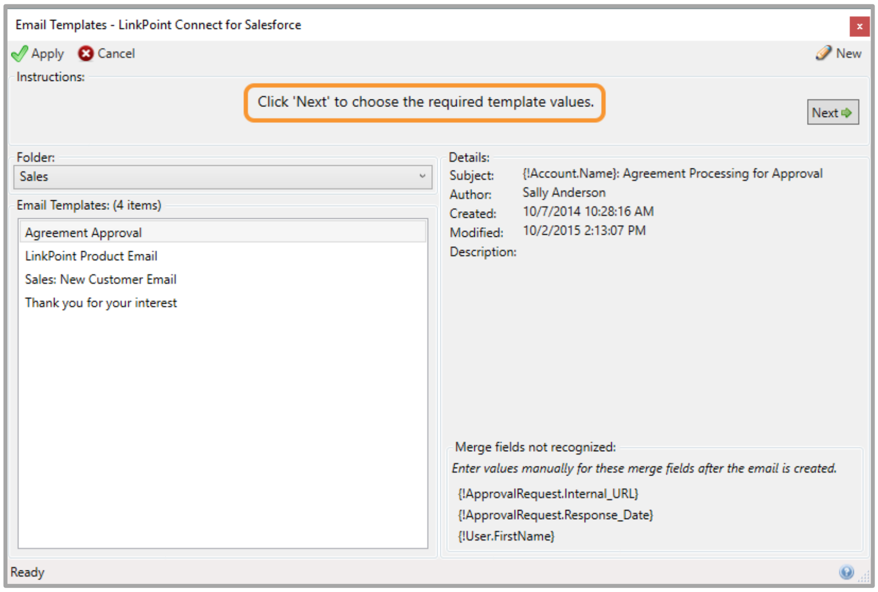
5a Click the **Apply** button if the selected email does not require any additional steps or data selection.



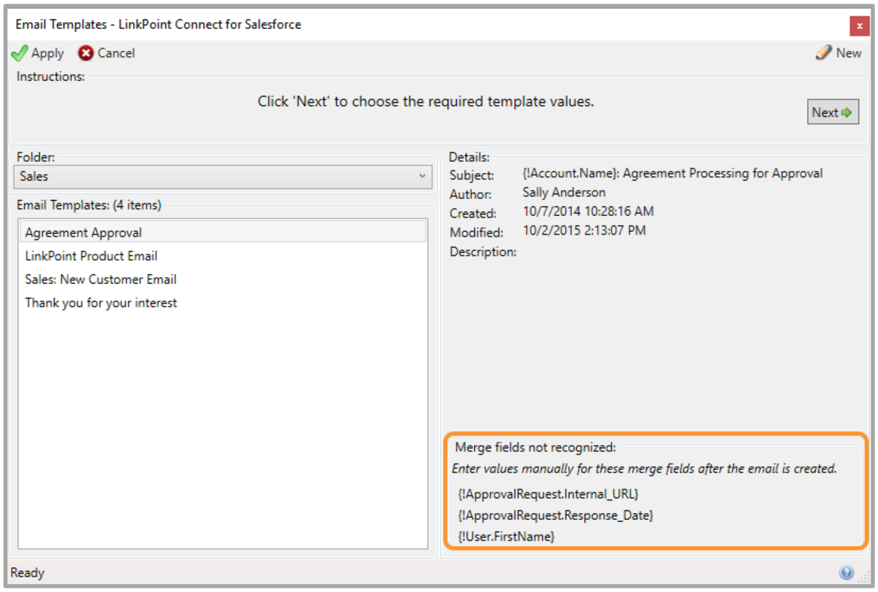
5b Click the **Next** button if the selected email requires additional data selection to populate the template.



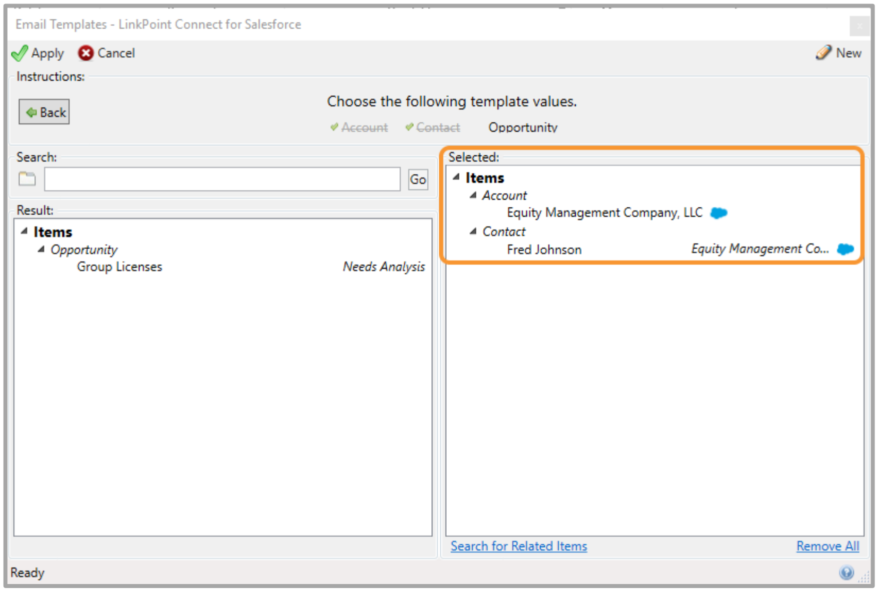
Tip: LinkPoint Connect will prompt you regarding next steps in the **Instructions** section of the **Salesforce Email Templates** window.



Warning: Each template's requirements will vary depending on the values needed for the original template. LinkPoint Connect will only be able to fill in content for standard Salesforce fields. If your template includes data merge for custom Salesforce objects, you will see the fields listed under the **Merge fields not recognized:** section of the **Salesforce Email Templates** window. These fields will appear as field names, without data populated, in the body of the email.

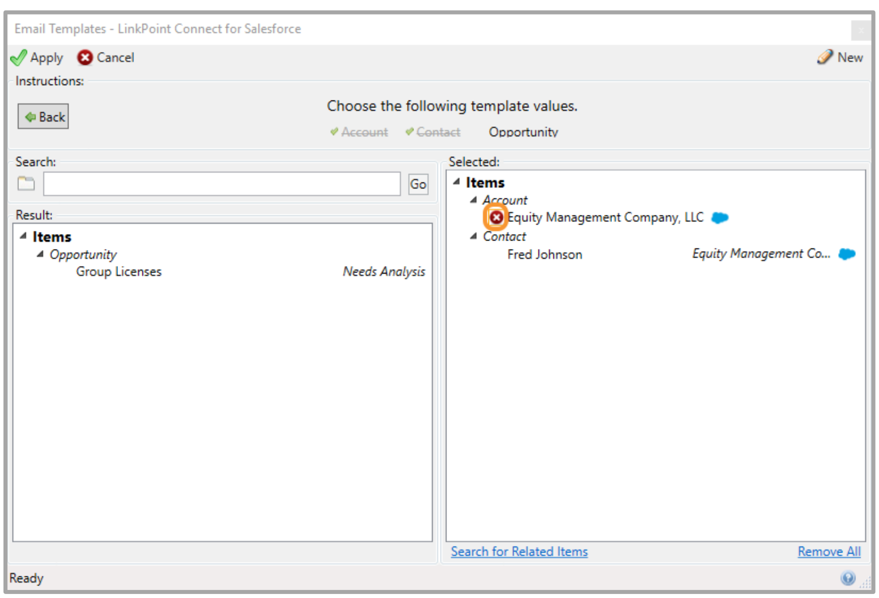


6 Determine the selections for the required template values. If an email template is designed to merge information specific to the recipient (such as a name, Account, and or Case), LinkPoint Connect will search Salesforce for Contact information that matches the required fields. Fields that have a single match will be noted in the **Selected** section of the **Email Templates** window and will appear checked off in the **Instructions**.

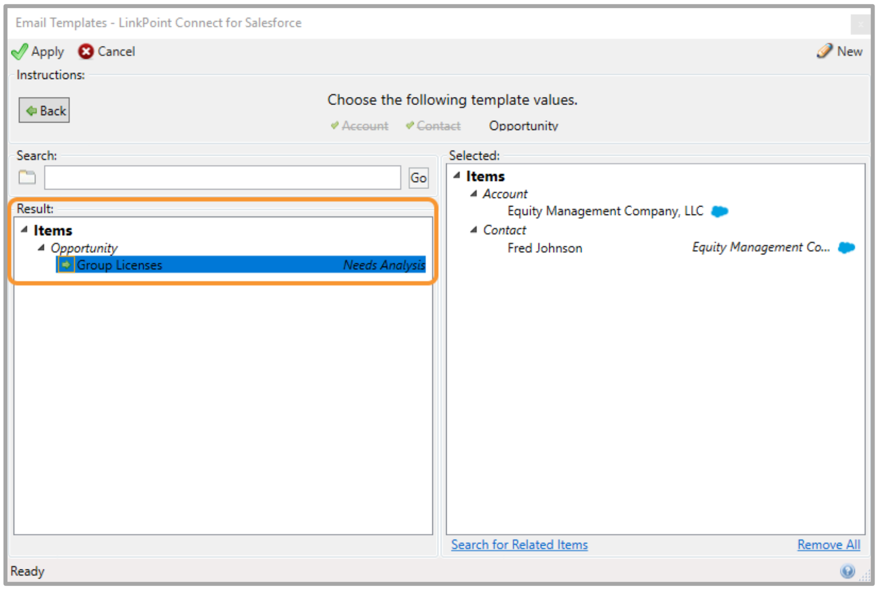


Tip: You can insert information into the template for only one Contact. If you have multiple recipients on the email, you will have to manually select which Contact's information should be used for the merge fields. LinkPoint Connect will display all matching Salesforce records based on the recipients on the actual email.

7 Review the **Items** in the **Selected** section of the **Email Templates** window. Mouse over an item and click the red x to remove it from the Selected list if needed.

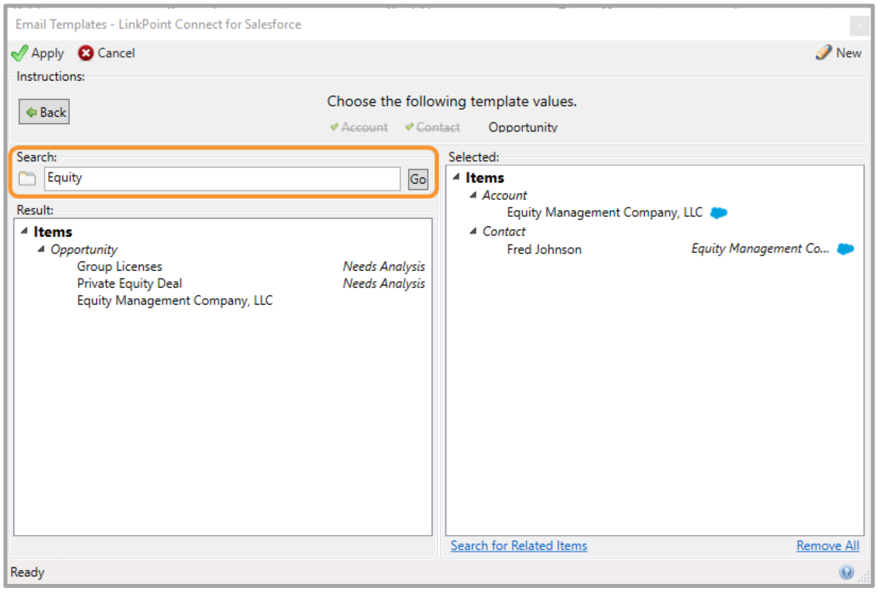


8 Select any additional items from the **Result** section of the Email Templates window and click the green arrows to move them to the **Selected** list.



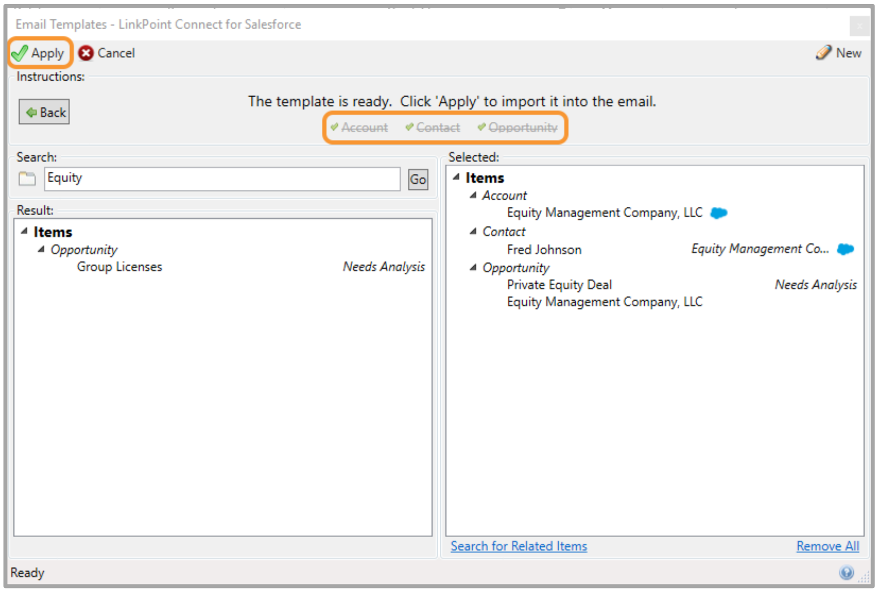
Tip: LinkPoint Connect will automatically provide matches for required template values. However, if more than one match is found, you will have to manually select which value should be used for the merge field. LinkPoint Connect will display all matching Salesforce records as Results.

9 Enter text in the **Search** field and click **Go** to search for additional values as needed. Click the **green arrow** to add the item to the Selected list.



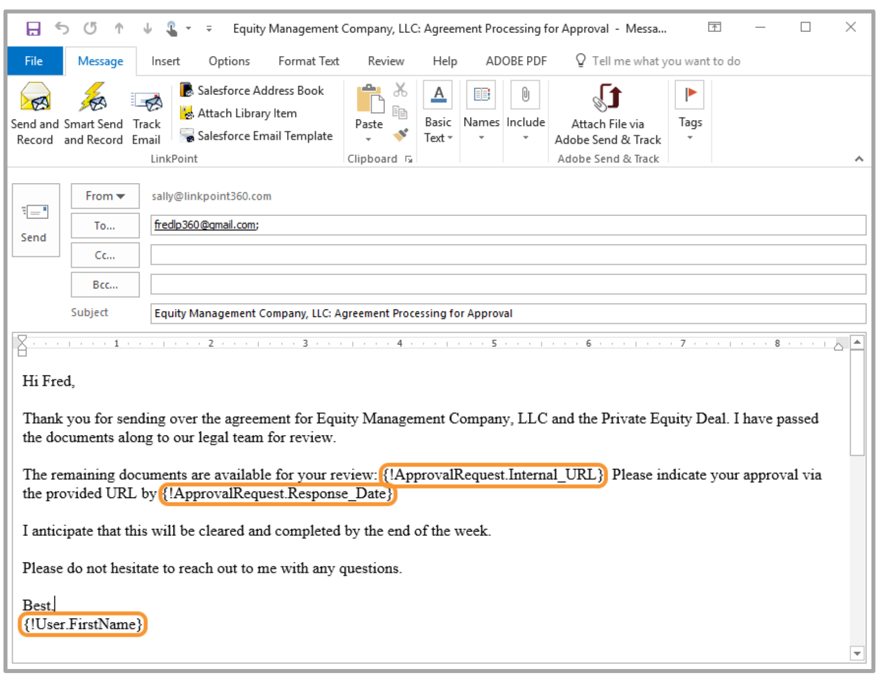
Tip: If you do not specify a recipient on the email before launching the Email Templates wizard, you will have to search for all of the template values.

10 Click **Apply** once all of the template values have been associated with an **Item**. All of the values in the Instructions list will have a checkmark once this is complete.



11 Work with the email template within Outlook, and send and record the email when finished.

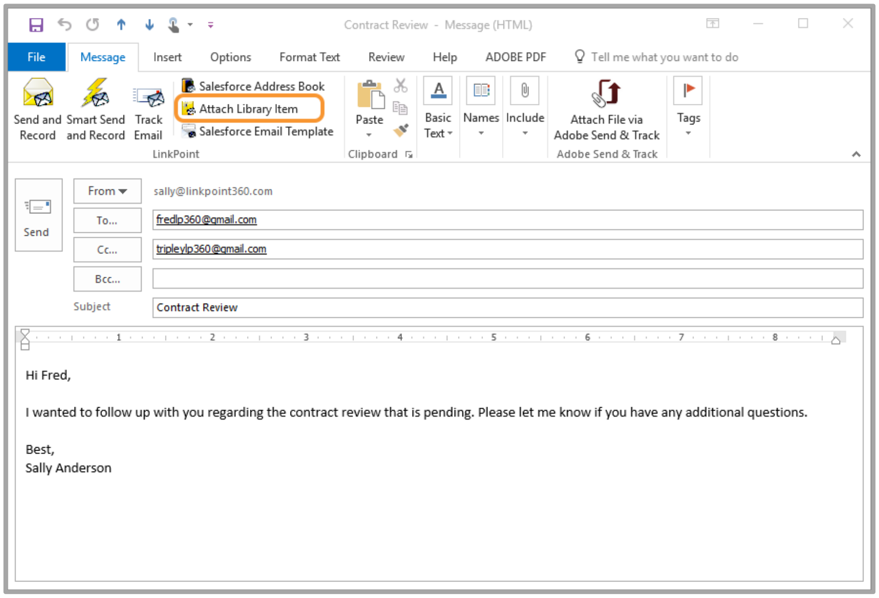
Warning: Once you import the template into the email, you will manually need to enter values for any fields for which LinkPoint Connect was unable to populate data.



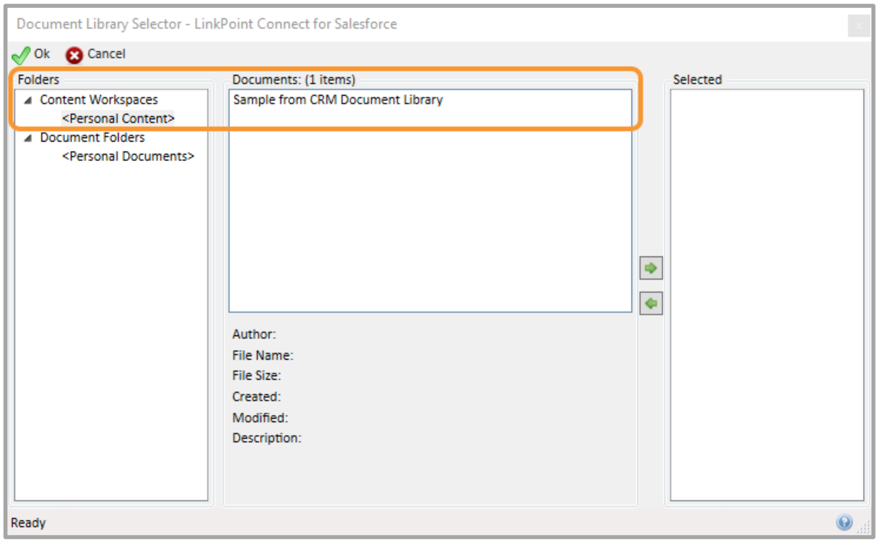
Attaching Salesforce Documents to Outbound Emails in Outlook

LinkPoint Connect helps users be more efficient by providing access to the resources they use right where they need them. Users are able to access documents that are stored and maintained within Salesforce directly from Microsoft Outlook. This eliminates the need to toggle between systems to find the right document to attach. In this section, you will learn how to access your Salesforce Document Library and attach items to outbound emails from Outlook.

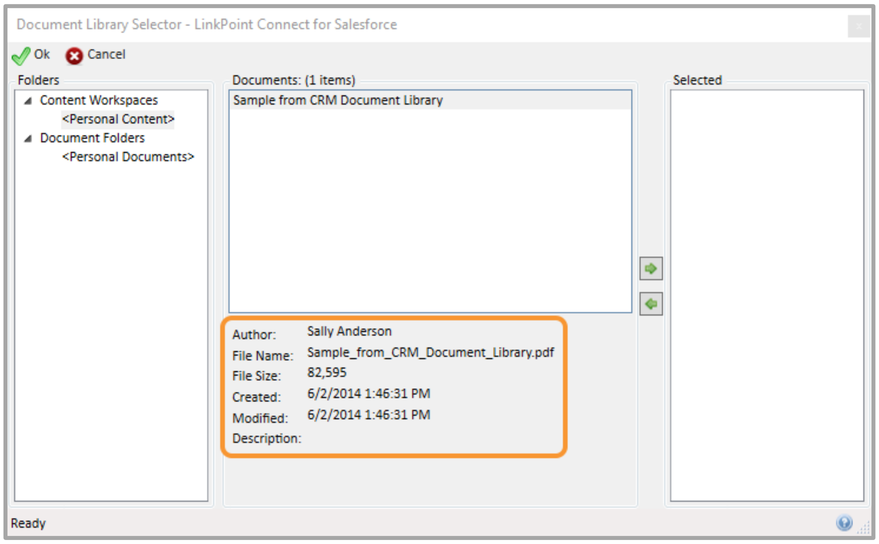
1 Open an outgoing email and click the **Attach Library Item** button on the Microsoft Outlook ribbon.



2 Select the Salesforce **Folder** that contains the document and view a list of available items in the **Documents** list. In some cases, you may need to click to expand nested folders.

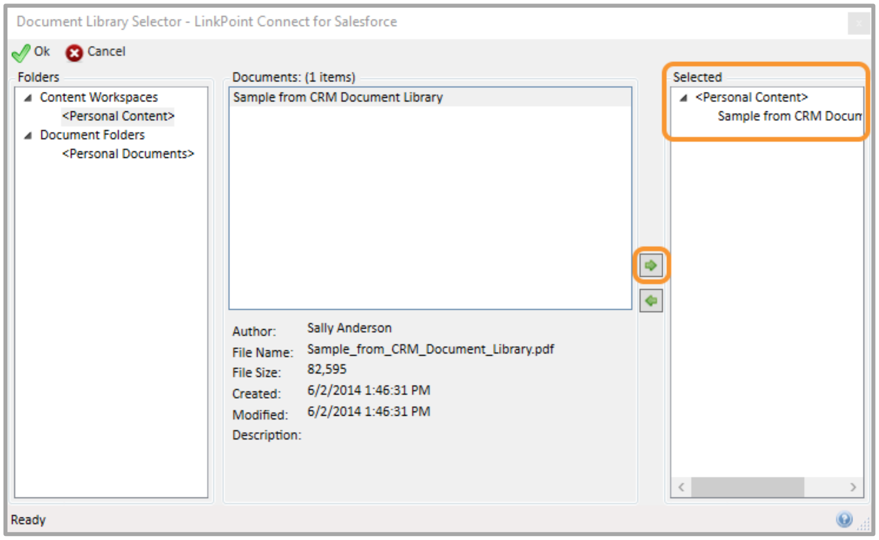


Tip: Note that the document information is displayed below the Documents pane.



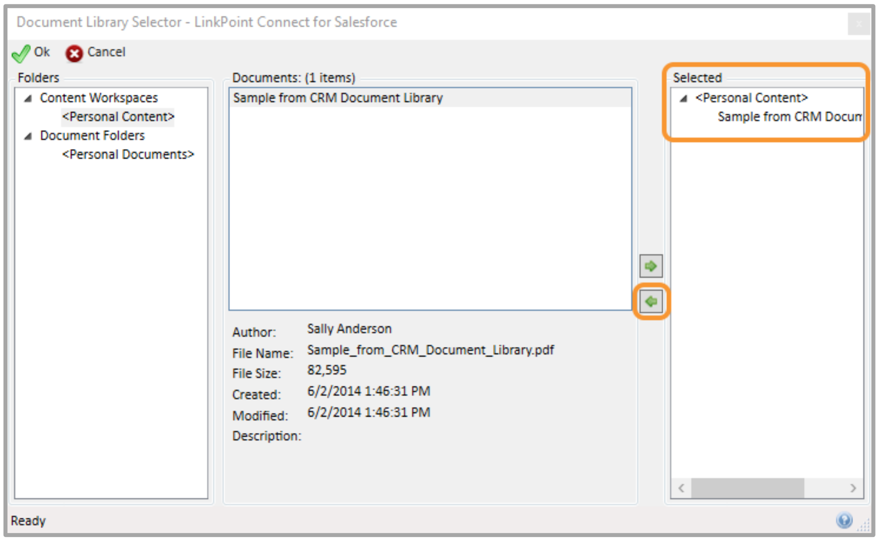
3

Select an item in the **Documents** pane and click the right arrow to add the item to the **Selected** pane.



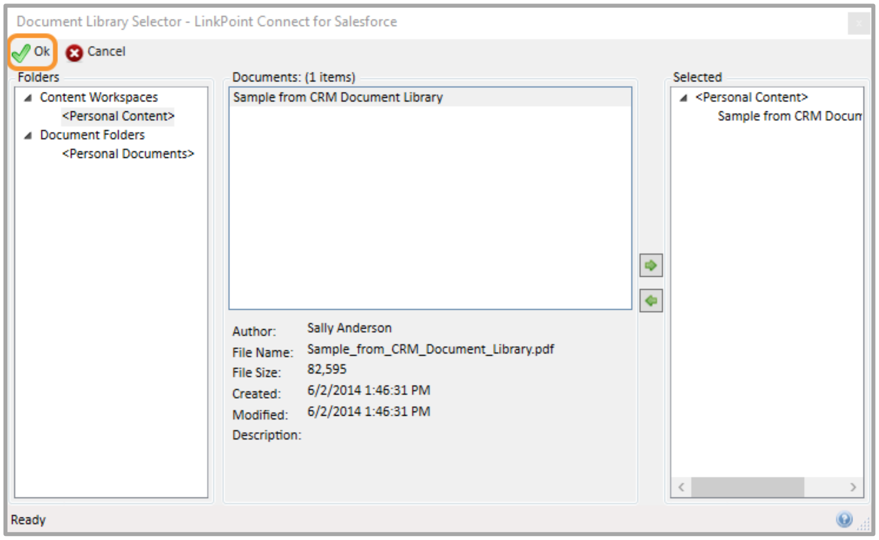
4

Select an item in the **Selected** list and click the left arrow remove the item from the Selected pane.



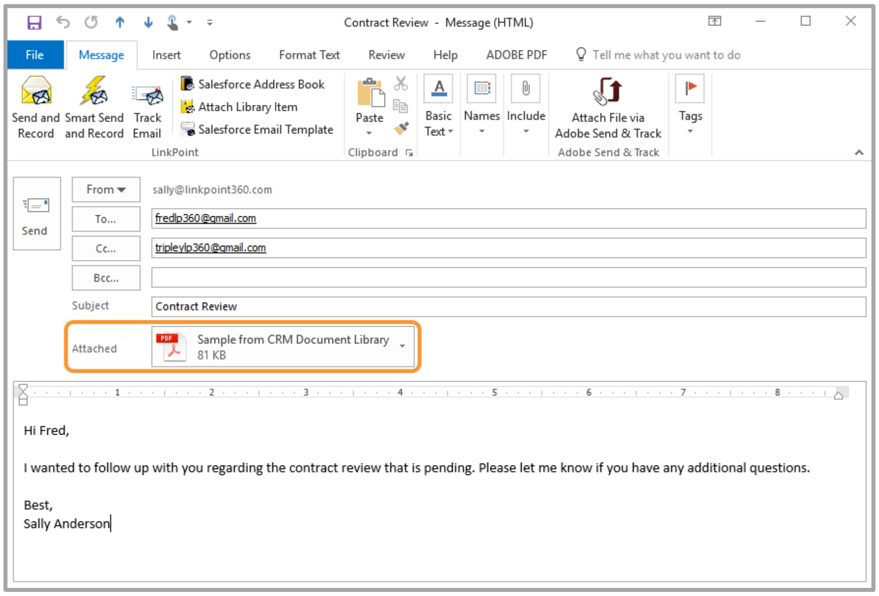
5

Click **OK** to proceed.



6

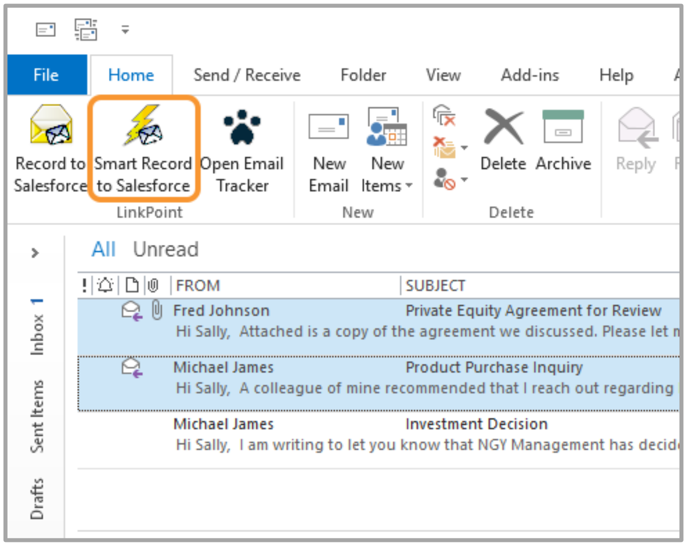
Note that the document from the Salesforce Document Library is now attached to the email. Finalize and send the email as you normally would.



Recording Emails to Salesforce with Smart Record and Smart Send

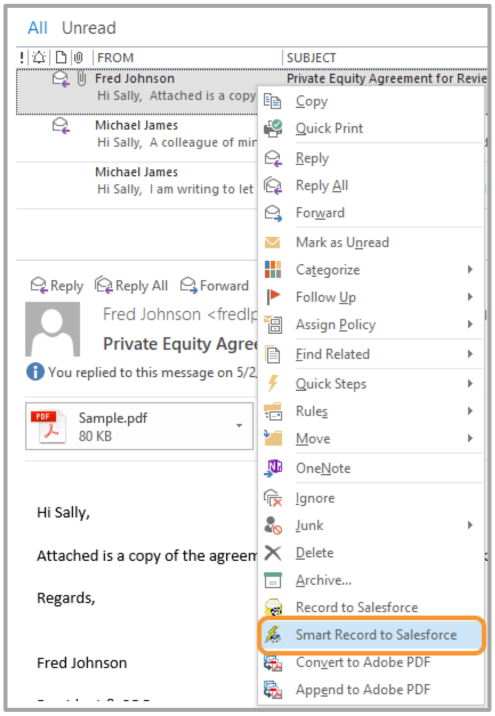
Smart Record and Smart Send offer a quicker way of recording emails to related Contacts in Salesforce. LinkPoint Connect checks behind the scenes to identify Contacts that match between the email recipient fields and Salesforce Contacts. The emails are automatically recorded to the matching records without the user launching the LinkPoint Connect Record window. Note that Smart Send and Smart Record do not automatically record to other record types (i.e. Leads) or to other objects (i.e. Opportunity, Case). Users looking for more control over recording should use the Send and Record to Salesforce button as usual. In this section, you will learn how to use Smart Record and Smart Send.

1. Select an email (or emails) and click the **Smart Record to Salesforce** button in Microsoft Outlook Ribbon.

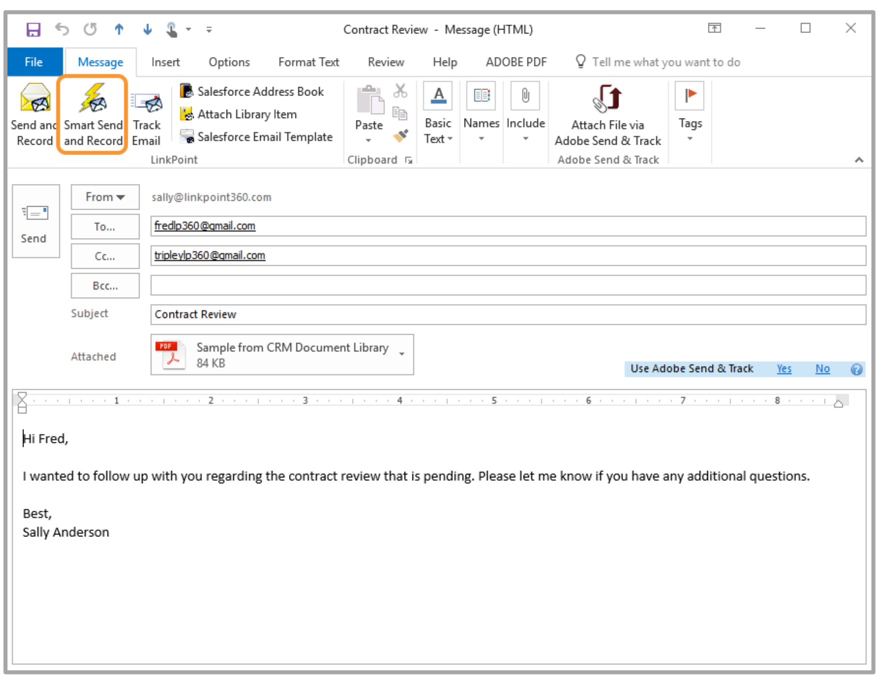


Tip: There are two other ways to access the Smart Record and Smart Send functionality for LinkPoint Connect.

- Right click an email in the inbox and select **Smart Record to Salesforce** from the menu.

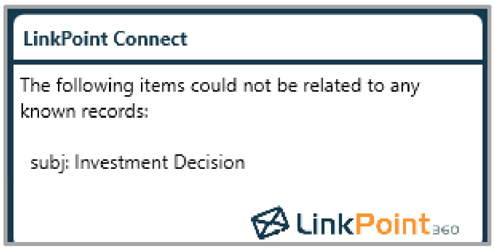


- Within an open outbound email, click the **Smart Send and Record** button.

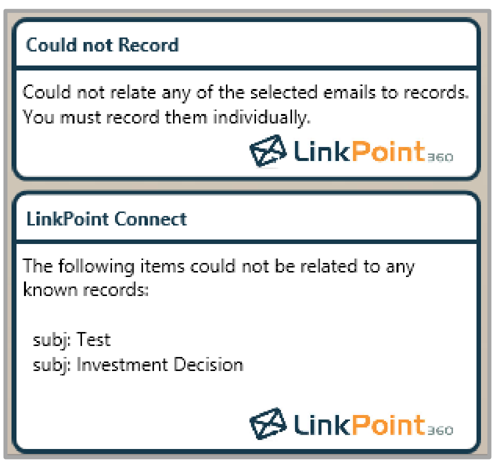


2 LinkPoint Connect will run a background search to determine whether any of the email recipients or senders match Contact records in Salesforce. The email will be recorded to all matching Salesforce Contact records automatically. A pop-up notification will confirm that the email has been recorded.

3 LinkPoint Connect will identify any emails that include Contacts for which there is no match in Salesforce. A pop-up notification will indicate the email that was not recorded.

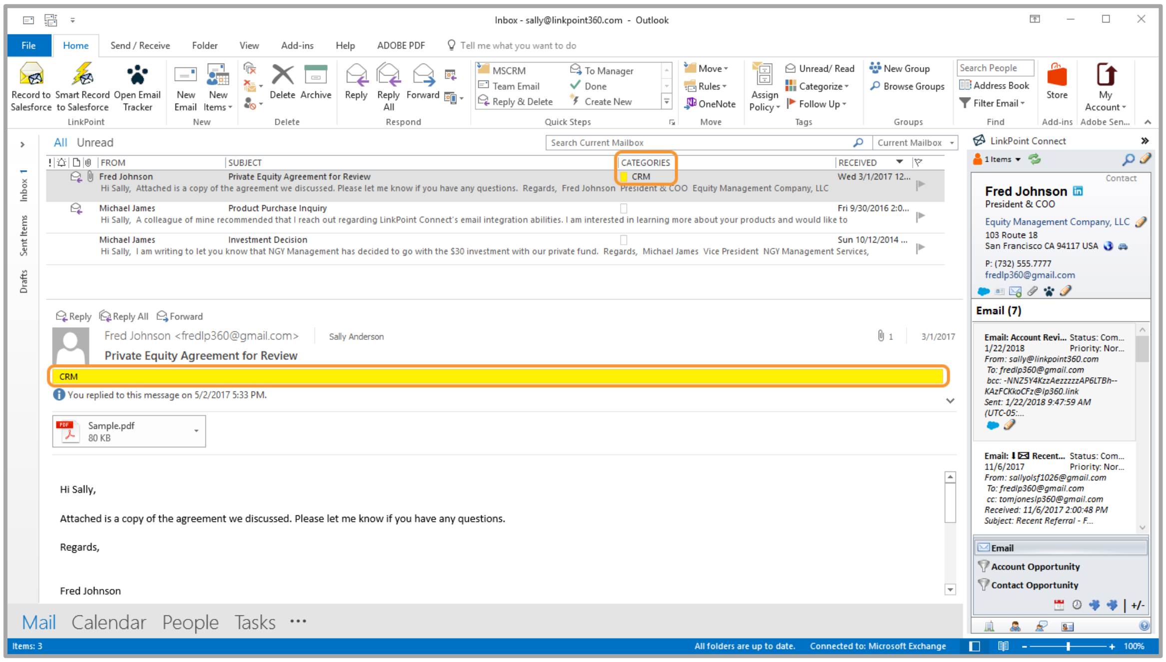


Warning: If there are multiple emails without a matching Contact record in Salesforce, a pop-up notification will indicate the emails that were not recorded by subject line. However, the Record window will not automatically launch.



Tip: If you want to record the email to a combination of Contacts and objects such Opportunities or Cases, use the **Record to Salesforce** button instead.

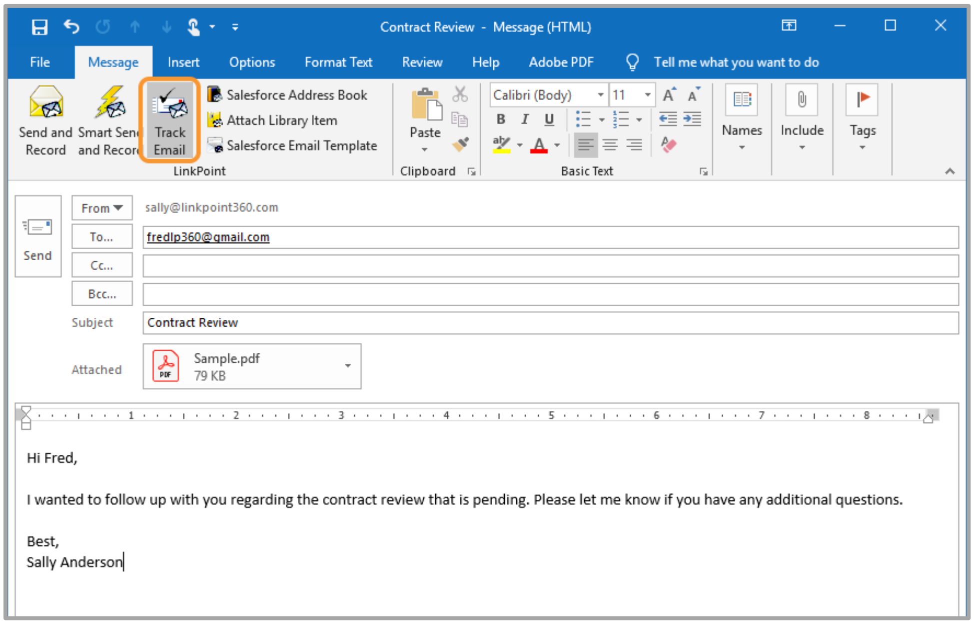
4 The **CRM** Category will be assigned to the email in Outlook once the email has been recorded to Salesforce.



Tracking Email Opens with LinkPoint Tracker

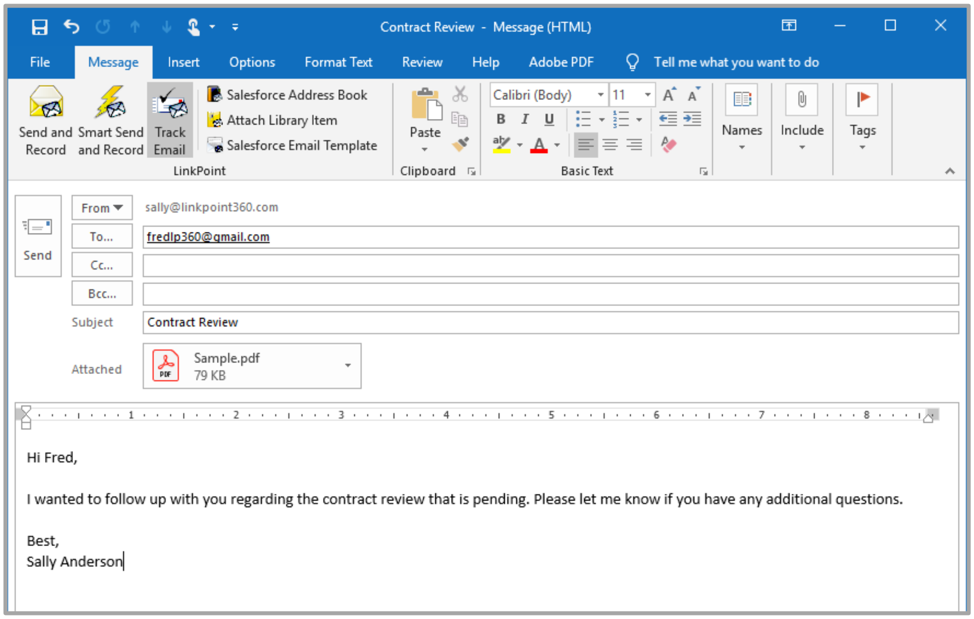
LinkPoint Tracker enables users to track when an outbound email is opened by one or more recipients. With real-time notifications, users can proactively follow up with key Leads and Contacts. In this section, you will learn how to use LinkPoint Tracker to monitor when emails are opened.

1 Compose an email and click the **Track Email** button in the LinkPoint section of the Microsoft Outlook Ribbon.



Tip: LinkPoint Tracker will indicate if an email is opened. If tracking an email sent to multiple recipients, LinkPoint Tracker will only indicate that a person has opened the email. It will not distinguish which of the recipients opened the email. If you need to track opens on a per-recipient basis, consider sending separate emails or using LinkPoint Tracker along with the LinkPoint Bcc Sender feature.

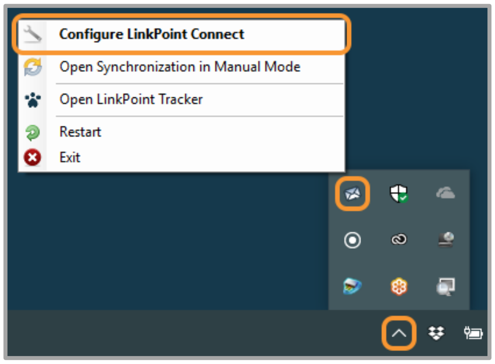
2 Complete the email and click **Send and Record**, **Smart Send and Record**, or **Send**, to complete the process.



Tip: When a tracked email is opened, a pop-up notification will display in real time, alerting the user that the email recipients are currently active.

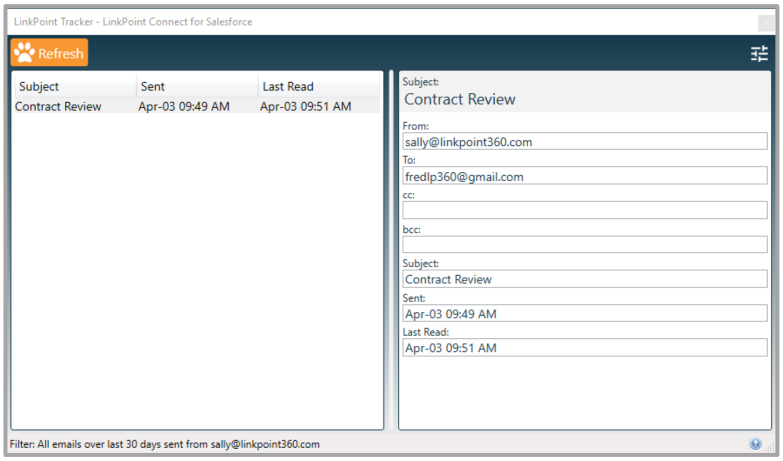
Tip: Emails sent and received within the same IP address will not be tracked. This helps limit the number of internal emails sent that do not need tracking.

3 Right click the **LinkPoint Assist** icon in the system tray and select **Open LinkPoint Tracker**.

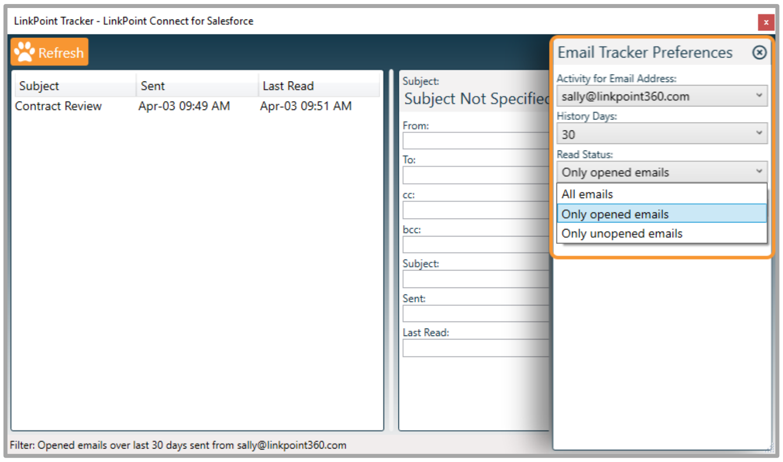


4

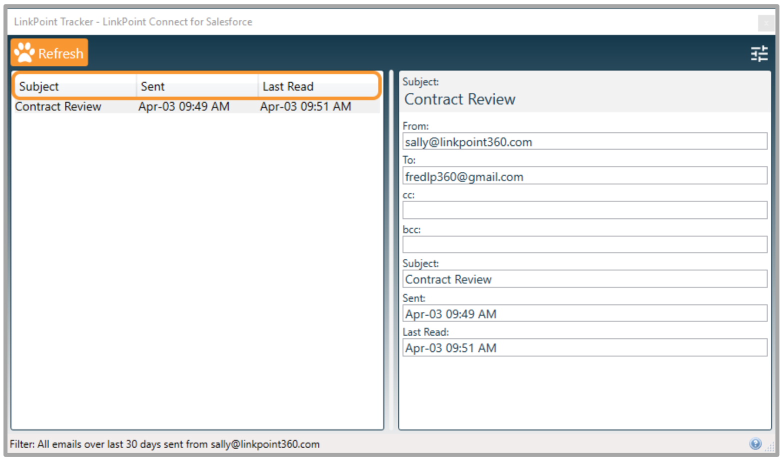
View the tracked email information in the **LinkPoint Tracker** window.



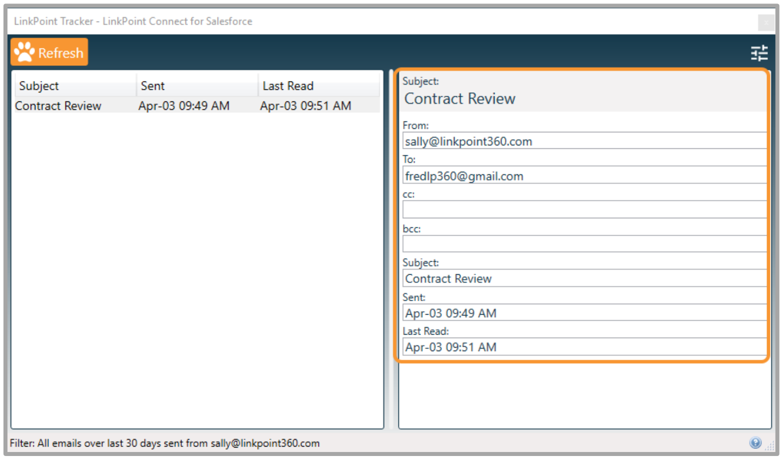
Tip: Use the Filters icon to expand the Email Tracker Preferences panel and adjust filters to show activity for different Email Addresses, date ranges, and open statuses.



5 Click the column headers to sort the table data by that column of information.



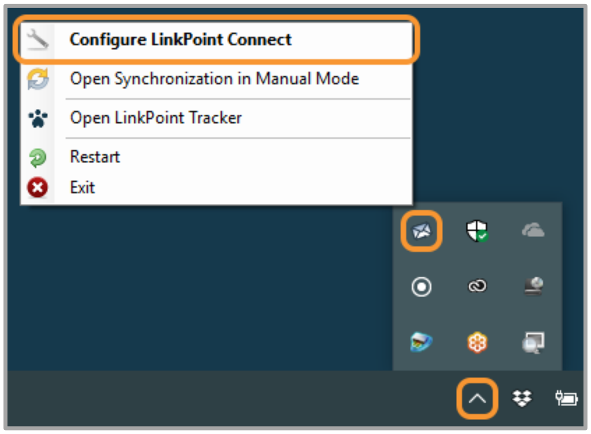
6 Select an email and view the **Details** pane for additional information including the recipients of the email, Subject, Sent, and Last Read date.



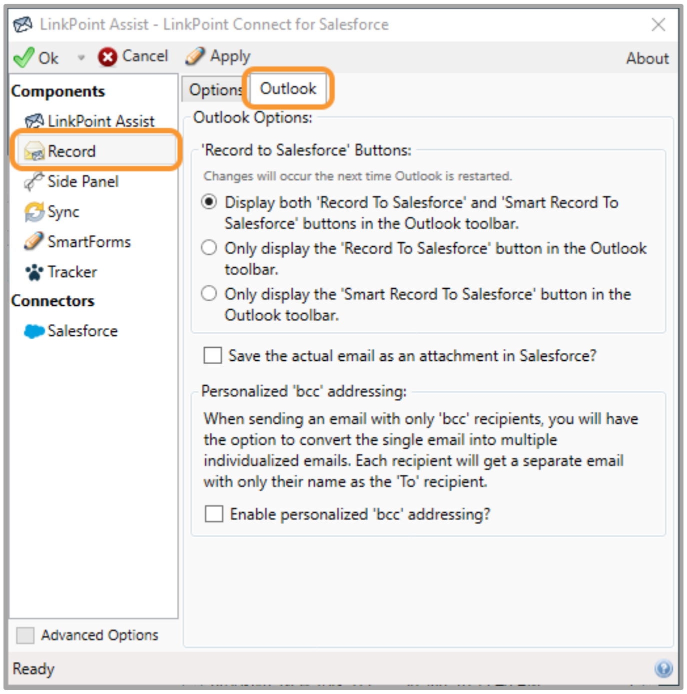
Sending Emails with LinkPoint Bcc Sender

LinkPoint Bcc Sender helps users send emails in a 1-to-1 format while using established distribution lists within Microsoft Outlook. In this section, you will learn how to use LinkPoint Bcc Sender when sending emails.

1. Right click the **LinkPoint Assist** icon in the system tray and select **Configure LinkPoint Connect**.

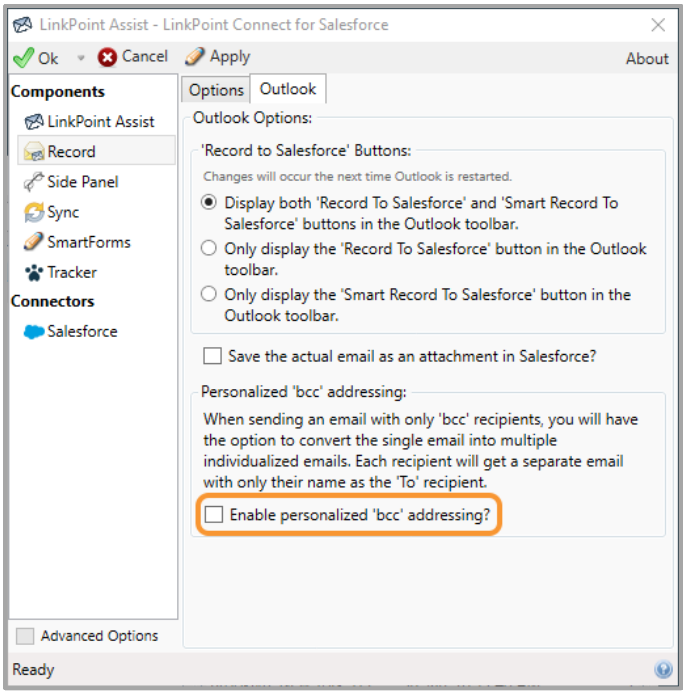


2. Select **Record** from the **Components** list within the **LinkPoint Assist** window, and select the **Outlook** tab.



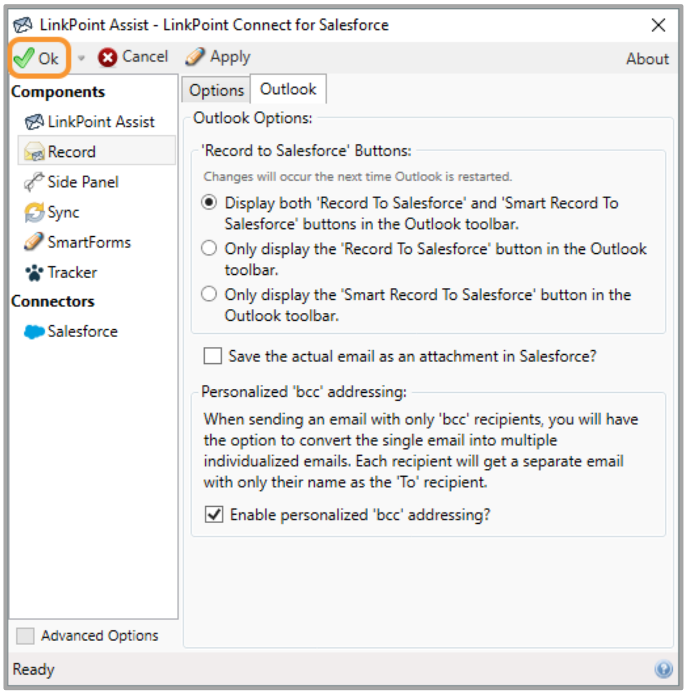
3

Select the checkbox to **Enable personalized 'bcc' addressing?**

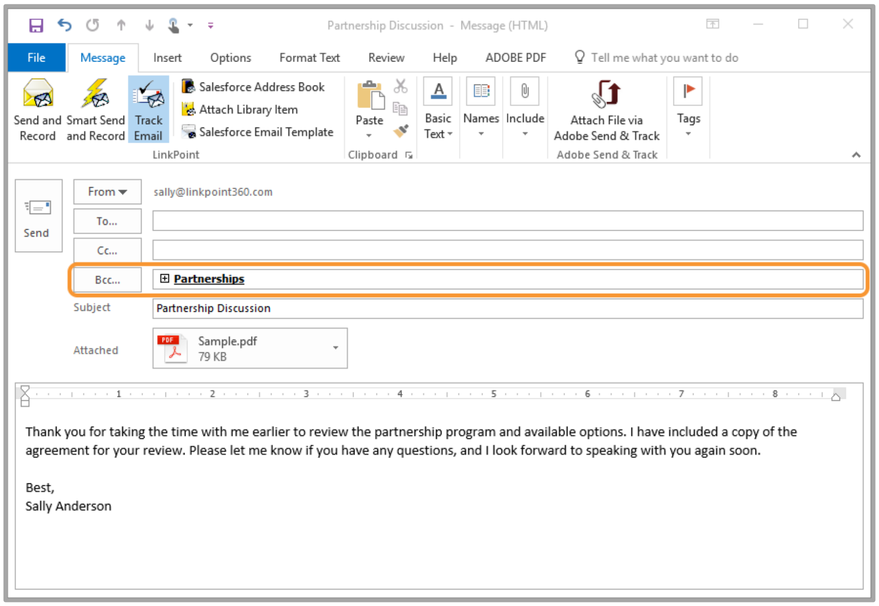


4

Click **Ok** to save the changes.



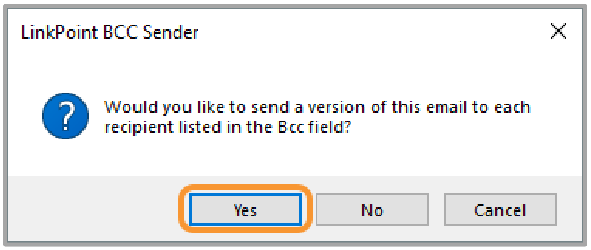
5 Compose an outbound email, and enter the email recipients in the Bcc field. This can be in the form of a list of individual email addresses or an email distribution list.



Tip: If you include recipients in both the To: and Bcc: fields, the LinkPoint Bcc Sender feature will not work. The only recipient field populated should be the Bcc field.

6 Complete the email and click **Send and Record**, **Smart Send and Record**, or **Send**, to complete the process.

7 Review the **LinkPoint Bcc Sender** window. To proceed with sending the individual emails using the feature, click **Yes**.



Tip: Tip: Clicking **No** will still send the email, but will not do so using the LinkPoint Bcc Sender feature. Click **Cancel** if you do not want to send the email at this time.

8 LinkPoint Bcc Sender will send out an individual instance of the email to every recipient included in the Bcc field. This is especially useful when sending out communication with merge fields or when trying to follow up with larger groups of leads or contacts in a way that appears more personalized.

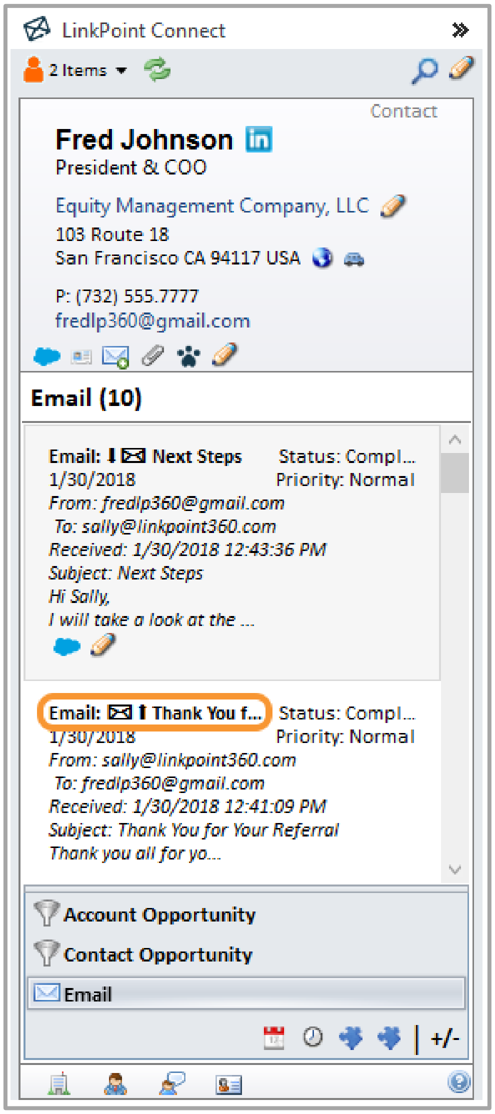
9 LinkPoint Bcc Sender will provide a .txt file with a report of each individual email address that the email was sent to individually. The report is emailed to the user initiating the send and is not provided to anyone included in the Bcc field.

Identifying Recorded Emails in Salesforce

LinkPoint Connect makes it easy for users to identify recorded emails within Salesforce by adding an indicator icon in the Subject Line within the Activity History. The indicator shows whether the item was an outbound or inbound email. These indicators are automatically applied as part of the recording process with LinkPoint Connect. In this section, you will learn how to determine whether a recorded email was either inbound or outbound when it was recorded to Salesforce.

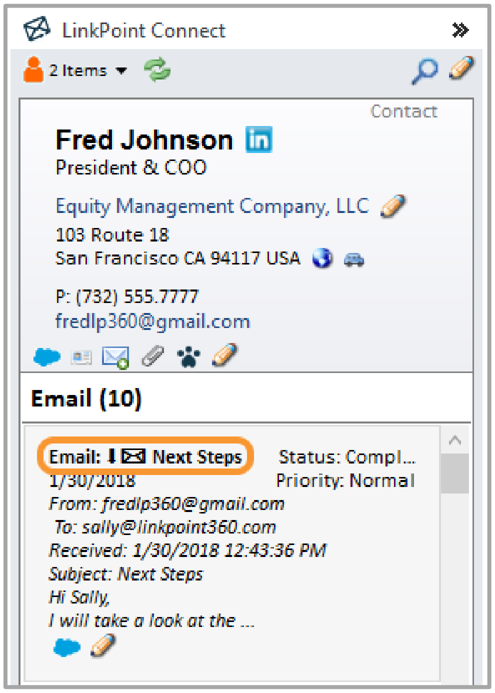
1. Compose an outbound email and send the email.

2. View the related **Lead** or **Contact** in the Side Panel. Select the **Email** object to see the list of recorded emails. Note that the latest recorded email has an ✉↑ indicator in the subject line noting that the email was outbound.

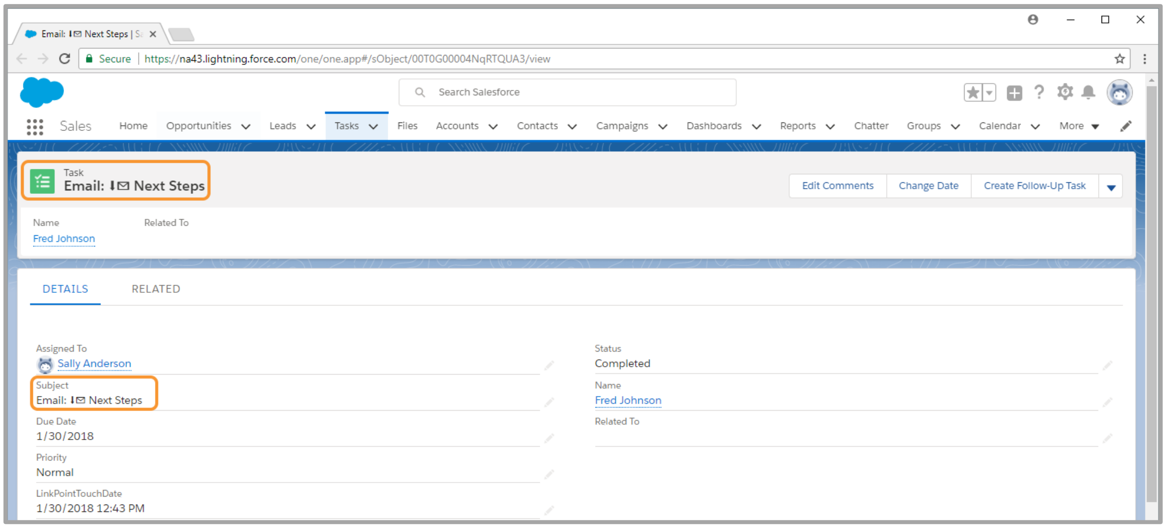


3 Identify an email in your inbox. Record the email as you typically would, either with Record to Salesforce, Smart Record to Salesforce, or Quick Record.

4 View the related Lead or Contact in the Side Panel. Select the Email object to see the list of recorded emails. Note that the latest recorded email has an ↓✉ indicator in the subject line noting that the email was inbound.



Tip: The ↓✉ (inbound) and ✉↑ (outbound) indicators are also visible to all Salesforce users when viewing the Activity History in Salesforce.



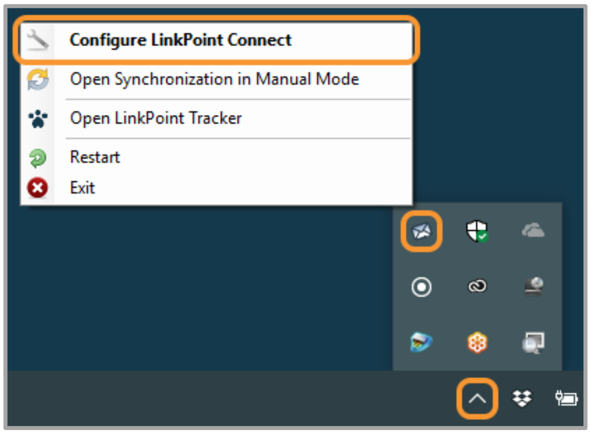
Searching and Recording Based on Secondary Email Address

By default, LinkPoint Connect searches for matching Contacts and Leads within Salesforce based on primary email address in order to display details in the Side Panel and Record Window. But in many cases, a single contact may have multiple email addresses. If a user receives an email from an existing Contact and LinkPoint Connect does not return a matching contact, it is possible that the Contact may be in Salesforce under a secondary email address. Users can enable secondary email address searching within LinkPoint Connect to make it easier to find contacts with several email addresses on file. In this section, you will learn how to enable and disable the setting that manages LinkPoint Connect email search fields.

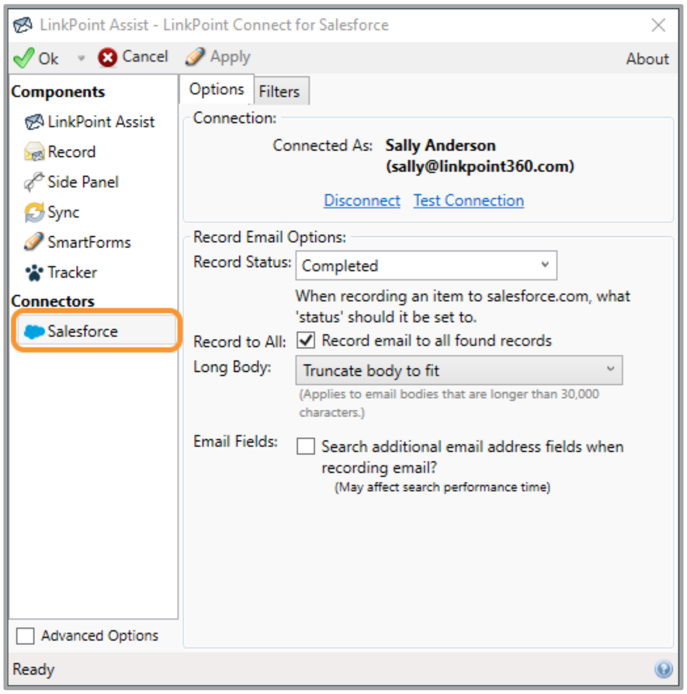
Warning: Enabling the feature outlined in the following steps may affect search performance time. This feature is disabled by default.

The Secondary Email Address feature does not search Person Accounts in Salesforce by default. Please contact your Account Executive for more information.

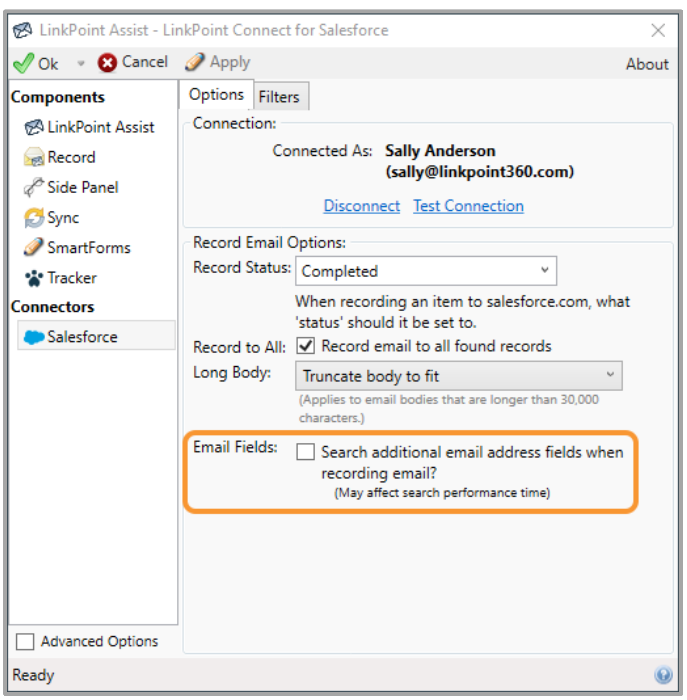
1. Right click the **LinkPoint Assist** icon in the system tray and select **Configure LinkPoint Connect**.



2 Select **Salesforce** from the **Connectors** list on the left side of the **LinkPoint Assist** window.

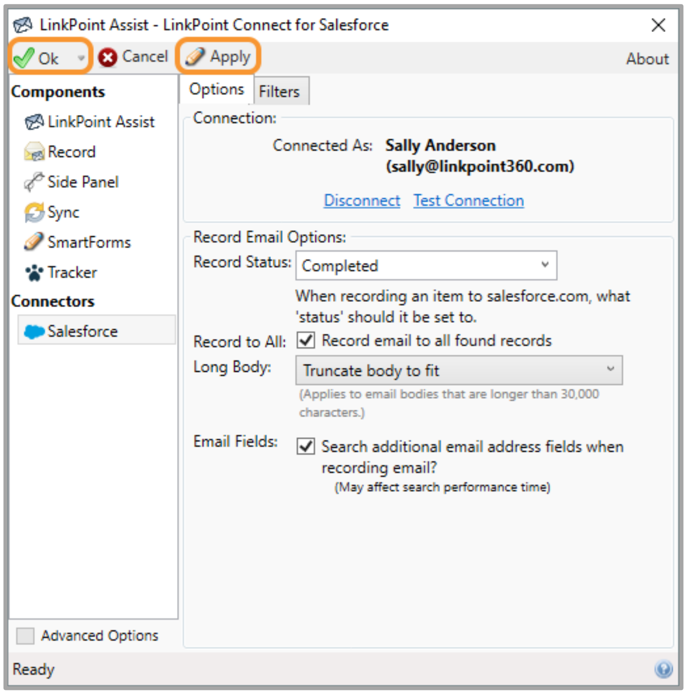


3 Select the checkbox for **Email Fields** to search additional email address fields when recording email or searching for contacts in the LinkPoint Connect Side Panel. Deselect the checkbox to disable the option.



4

Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



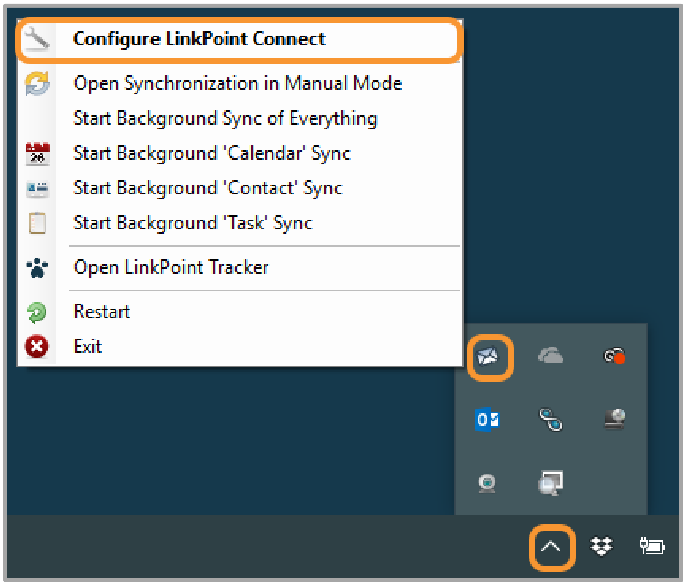
Syncing with LinkPoint Connect

Configuring LinkPoint Connect Auto Sync Settings

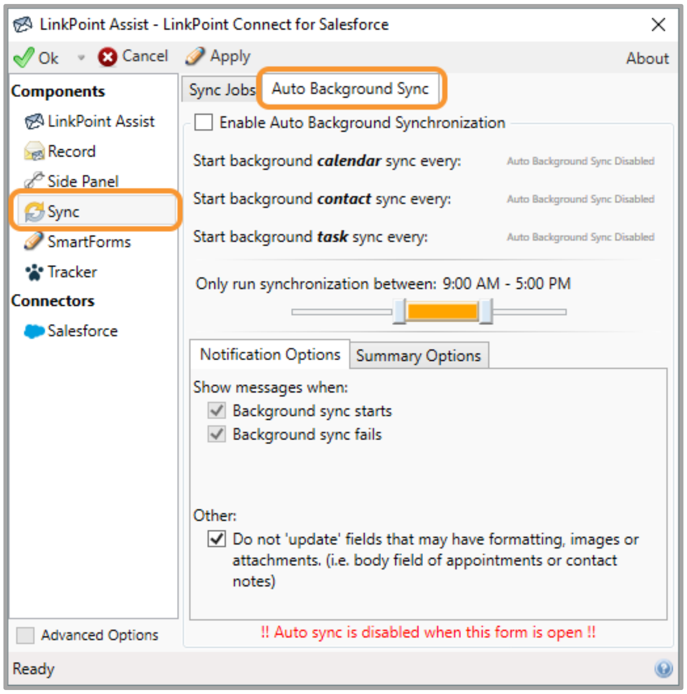
Users should become familiar with the available LinkPoint Connect sync settings before running a Manual Sync or scheduling an Auto Sync. The synchronization of Calendars, Contacts and Tasks works similarly but can be managed separately based on user preference. Users can set the timing and run schedule for the Auto Sync. Configuration settings for LinkPoint Connect are managed within the LinkPoint Assist window. In this section, you will learn how to configure the sync settings for LinkPoint Connect Auto Sync.

Warning: LinkPoint360 recommends that all first-time users of LinkPoint Connect set up and run a manual synchronization for the first Outlook and Salesforce sync. This offers users the opportunity to review the sync results before they take effect.

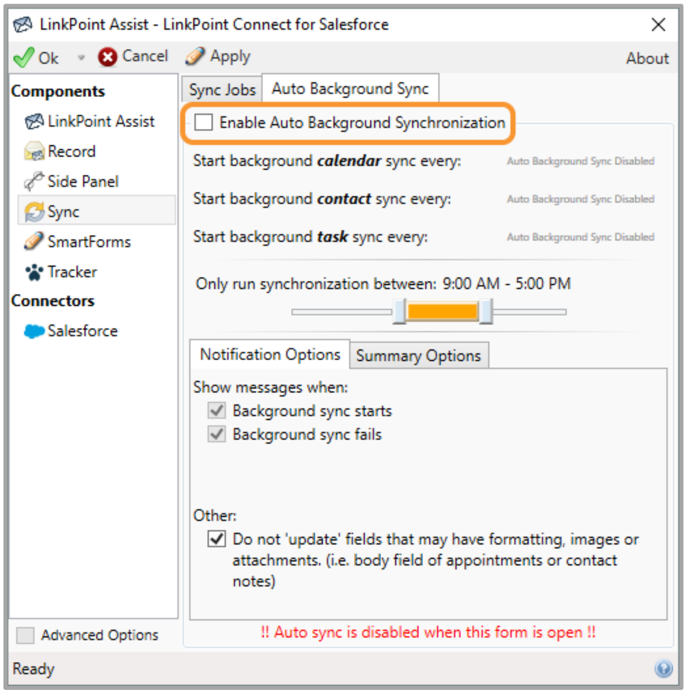
1. Right click the **LinkPoint Assist** icon in the system tray and select **Configure LinkPoint Connect**.



2 Select **Sync** from the **Components** list within the **LinkPoint Assist** window, and select the **Auto Background Sync** tab.

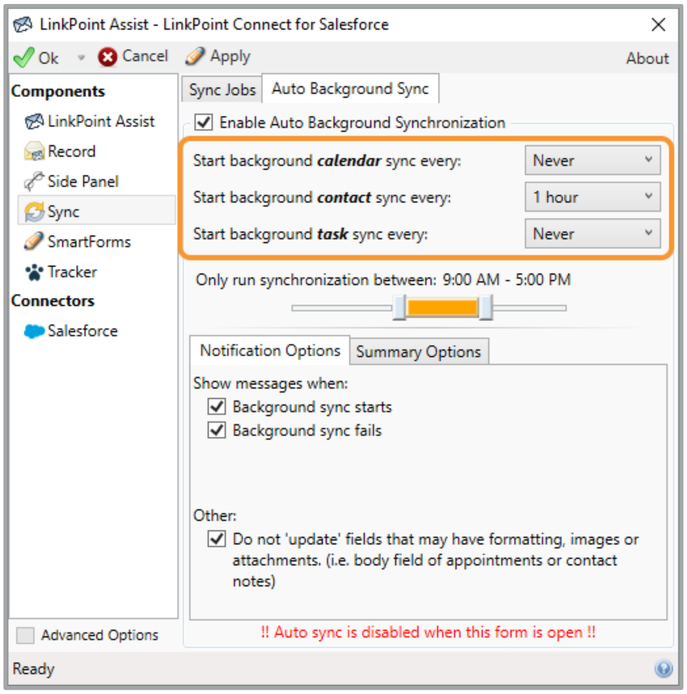


3 Select **Enable Auto Background Synchronization** to activate auto sync jobs.



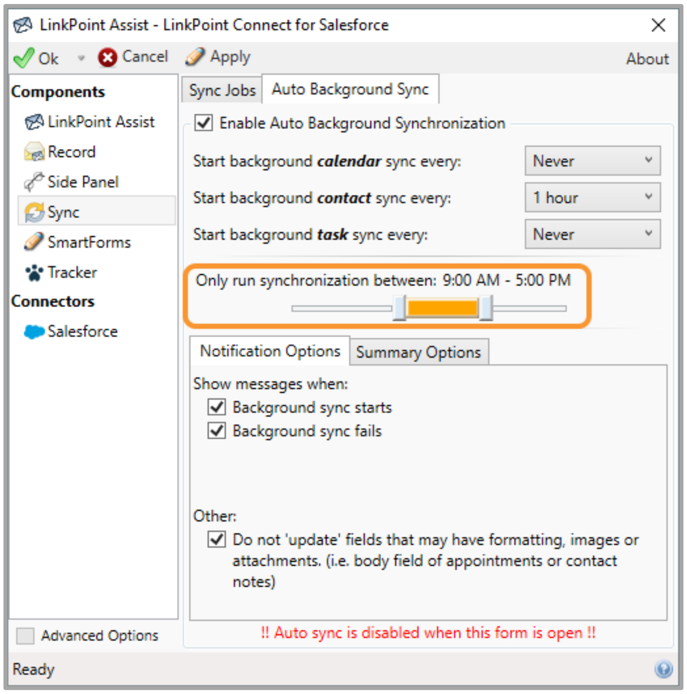
4

Review the options to **Start background** ***calendar*** **sync every:**, **Start background** ***contact*** **sync every:**, and **Start background** ***task*** **sync every:** and chose the frequency to auto sync for each option.



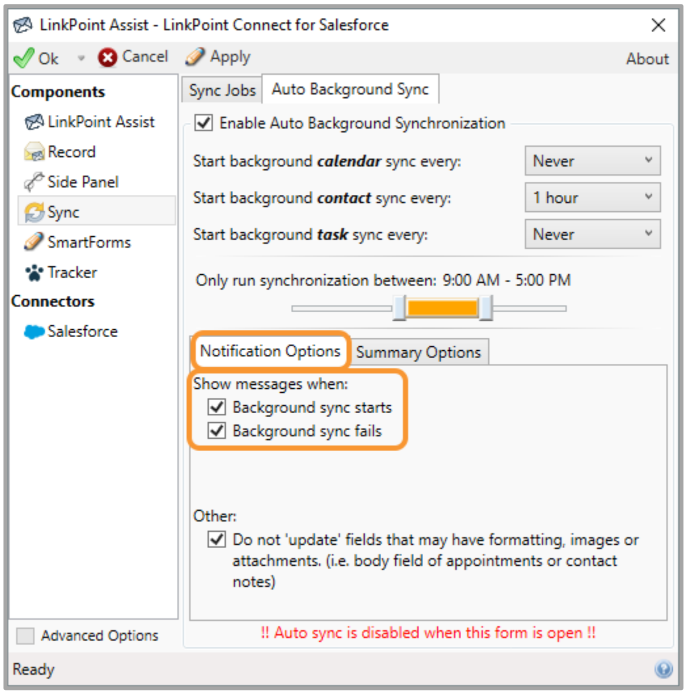
5

Select the time frame during which the Auto Sync should run during the day. Slide the selectors to the left or right to adjust the range.

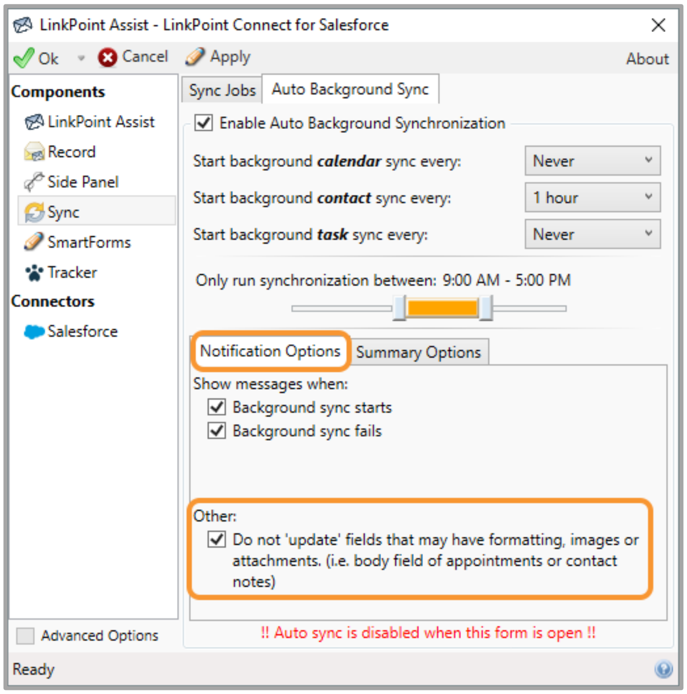


Tip: End users do not need to worry about misplaced appointments due to changes in time zones. LinkPoint Connect will run the sync based on the time zone where the end user computer is located. Calendar items are stored in Salesforce in GMT and then adjusted automatically for each user to match their end user.

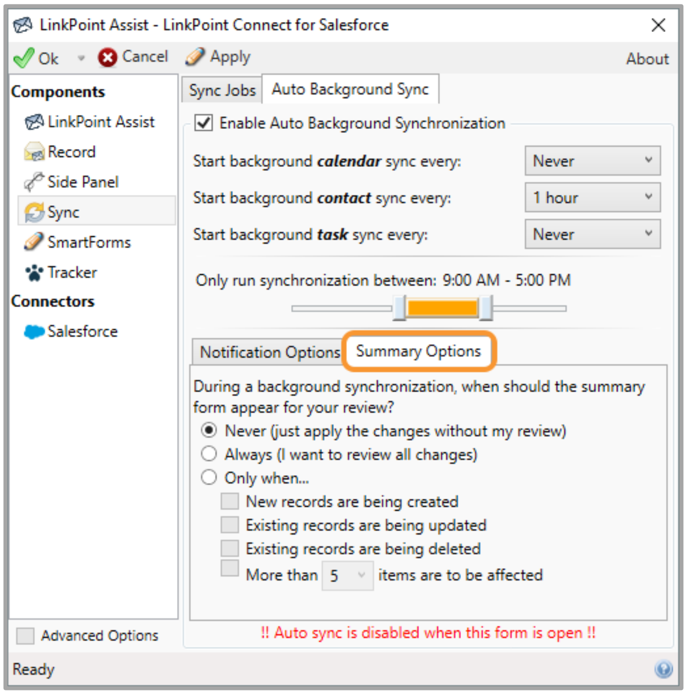
6 Select the **Notification Options** tab and select or deselect the checkboxes for the **Show messages when** options to enable pop-up notifications in the System Tray.



7 Select the checkbox in the **Other** section to prevent LinkPoint Connect from updating records in Outlook that have been changed in Salesforce if the original record contained special formatting.



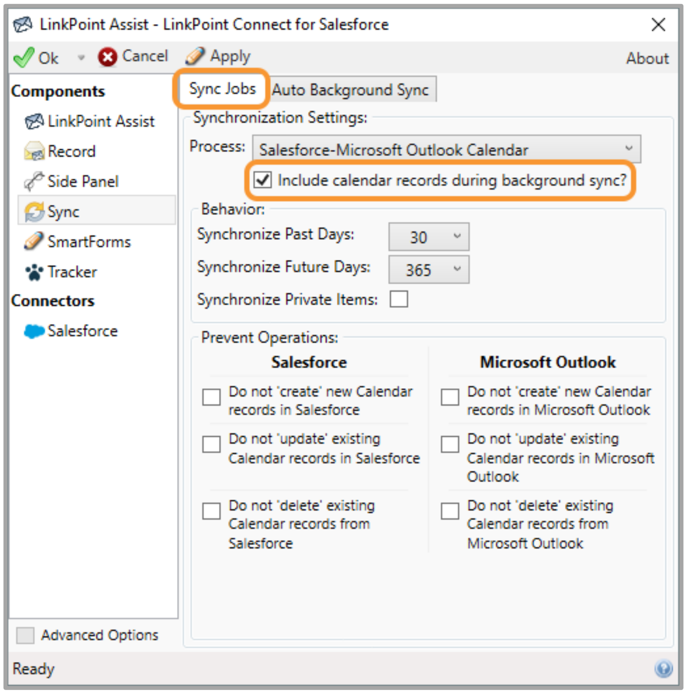
8 Select the **Summary Options** tab and indicate when the Synchronization Summary window should be displayed.



Tip: Auto Sync is designed to run with limited to no user interaction. Users can choose to set notifications to confirm when specific sync actions occur.

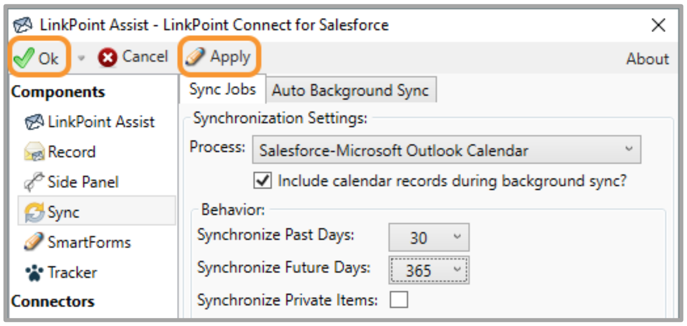
Example: For example, a user may have a calendar item in Microsoft Outlook that contains special formatting (such as unique fonts or colors). When the item syncs to Salesforce, the original item retains its formatting in Outlook, but the copy of the item in Salesforce loses the formatting due to Salesforce limitations. If the user makes a change to the item in Salesforce, LinkPoint Assist may try to sync the most updated version back to Outlook, depending on user settings. Selecting this option will prevent LinkPoint assist from overwriting the original body content in Outlook, thus preserving the formatting. Other details, such as meeting date or time, will still update if necessary.

9 Select the **Sync Jobs** tab in the LinkPoint Assist window and confirm that the **Include calendar records during background sync?** checkbox is selected for the items that should run in the Auto Sync.



Tip: You will need to select the **Process** and then select the **Include** checkbox for each item (i.e. Calendar, Contact, Task) that should be run in the Auto Sync.

10 Click the **Apply** button when finished to finalize the settings. Click **Ok** to close LinkPoint Assist.

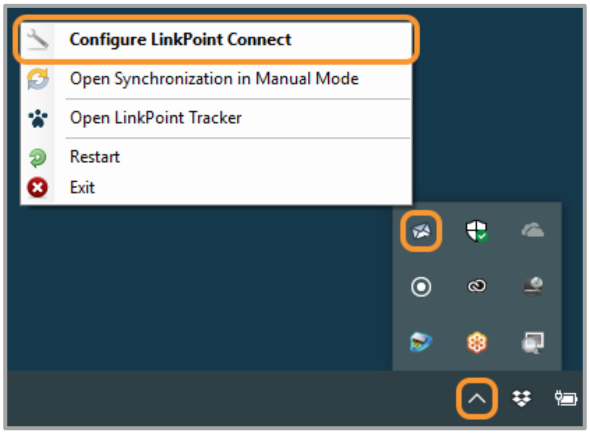


Configuring LinkPoint Connect Manual Sync Settings

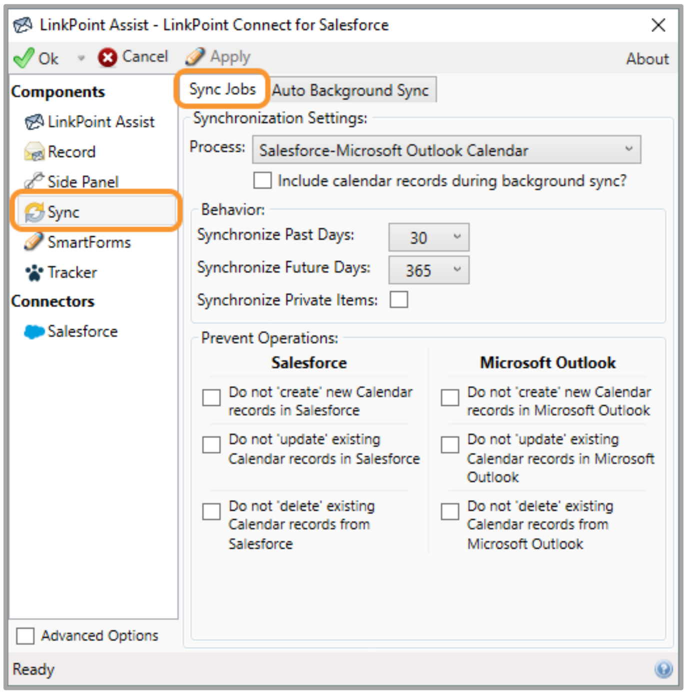
Users should become familiar with the available LinkPoint Connect sync settings before running a Manual Sync or scheduling an Auto Sync. The synchronization of Calendars, Contacts, and Tasks works similarly but can be managed separately based on user preference. Configuration settings for LinkPoint Connect are managed within the LinkPoint Assist window. In this section, you will learn how to access and alter the sync settings available for LinkPoint Connect Manual Sync.

Example: In this example, we will demonstrate how to configure the sync settings for Calendar items. The available sync setting options are similar for Calendars, Contacts, and Tasks.

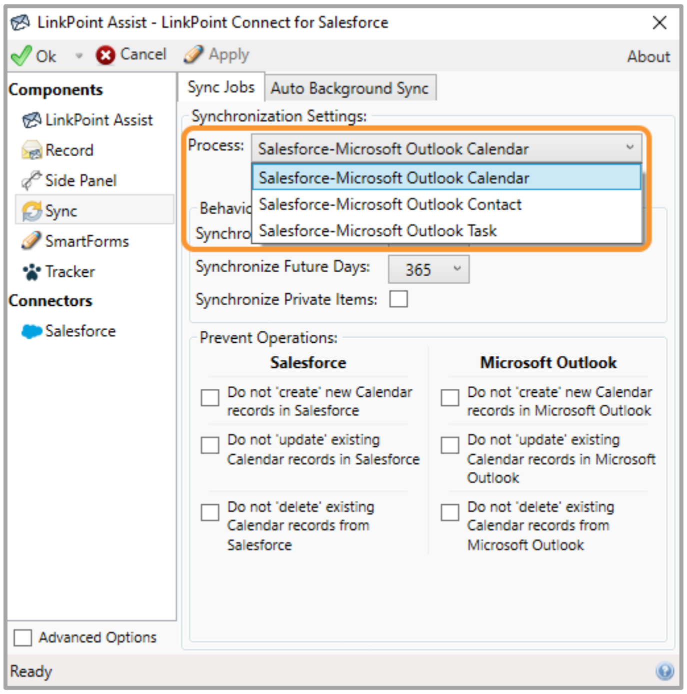
1 Right click the **LinkPoint Assist** icon in the system tray and select **Configure LinkPoint Connect**.



2 Select **Sync** from the **Components** list within the **LinkPoint Assist** window, and select the **Sync Jobs** tab.

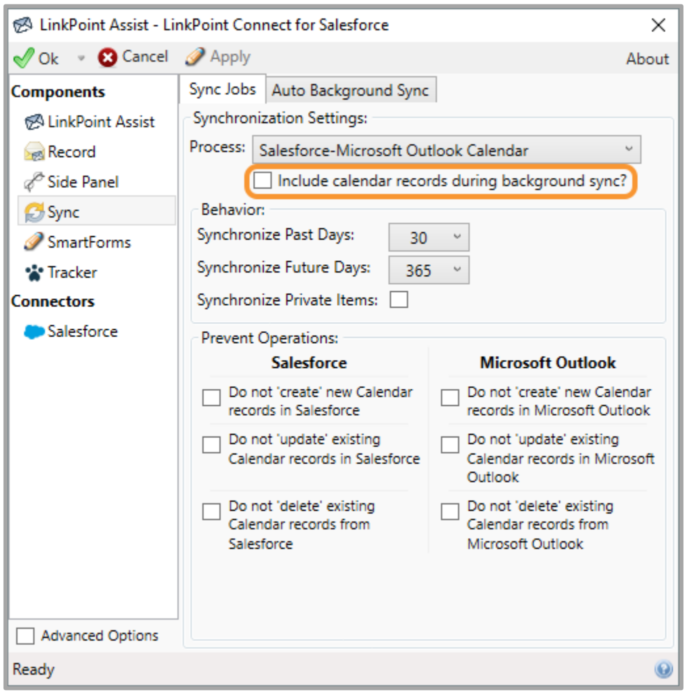


3 Select the **Process** to configure from the drop-down list. The options include Calendar, Contact, and Task.



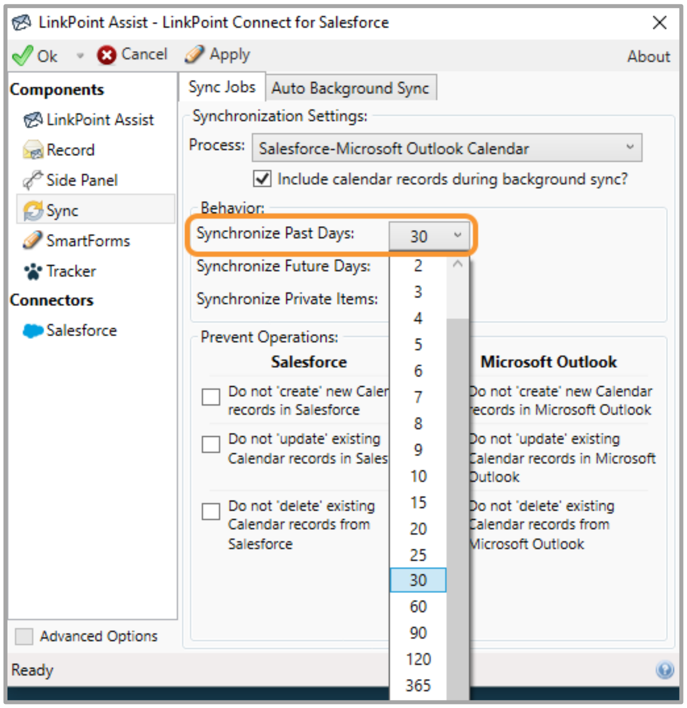
Tip: Sync settings for Calendars, Contacts, and Tasks are managed separately to give you more control over how your data is moved between Outlook and Salesforce. You will need to choose your sync settings individually for each Process by returning to the drop-down list and selecting the next item.

4 Select the **Include calendar records during background sync?** checkbox to ensure that Calendar sync is enabled.



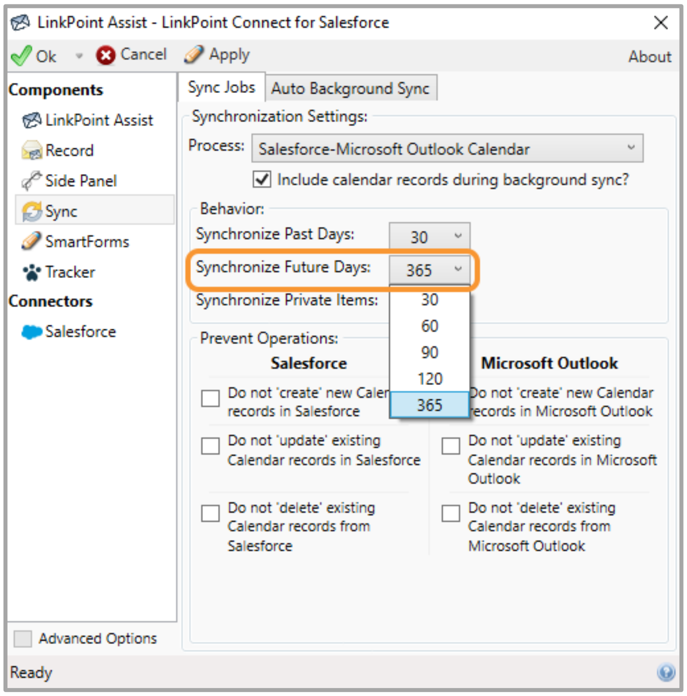
5

Select the number of days from the **Synchronize Past Days** drop-down list. This will determine how far back the sync will update or include information for dated items that occurred in the past.



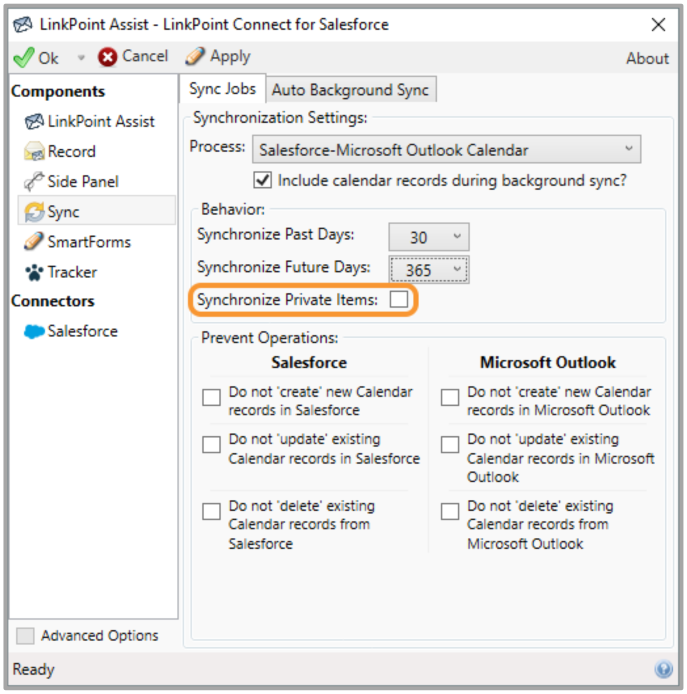
6

Select the number of days from the **Synchronize Future Days** drop-down list. This will determine to determine how far out upcoming events will sync.



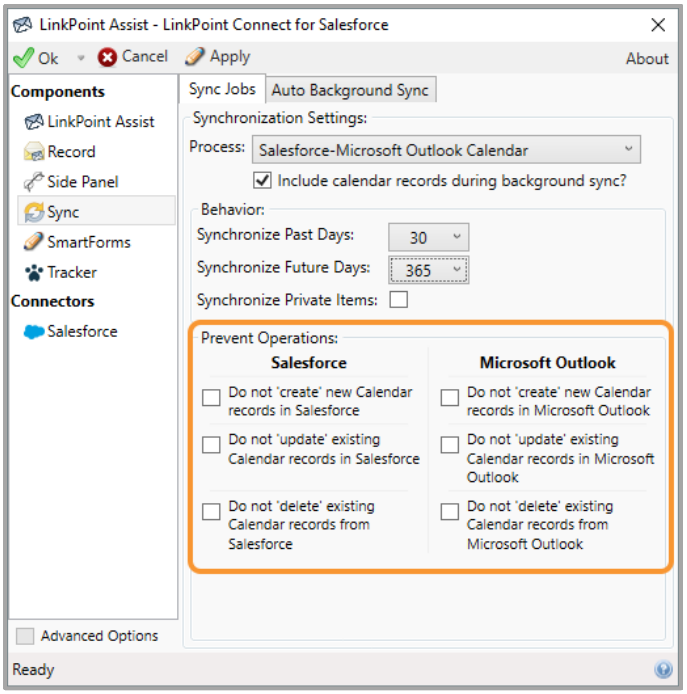
7

Deselect the **Synchronize Private Items** checkbox to ensure that Calendar items marked as Private are not included in the sync. Select the checkbox to send Private items between Outlook and Salesforce. Note that this option is deselected by default by LinkPoint Connect.



Tip: Remember, you will need to manually set any private Calendar items as Private on your Calendar. LinkPoint Connect only checks existing privacy settings and does not create privacy for individual items.

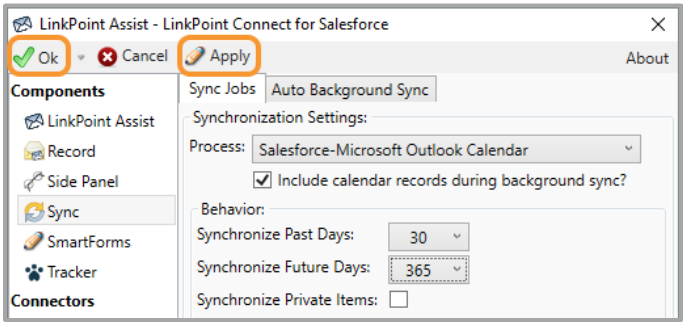
8 Select the options in the **Prevent Operations** section of the Sync Jobs tab based on workflow need.



Tip: Users can prevent LinkPoint Connect from creating, updating, or deleting items regardless of any other system settings. Users can set this individually for Microsoft Outlook and Salesforce, effectively creating bidirectional or one-way sync rules.

Tip: The **Do not 'delete' existing Contact records from Salesforce** option is selected by default in LinkPoint Connect as a precaution for users who do not want items removed from their instance of Salesforce. You can deselect the checkbox to override this setting.

9 Click the **Apply** button when finished to finalize the settings. Click **Ok** to close LinkPoint Assist.

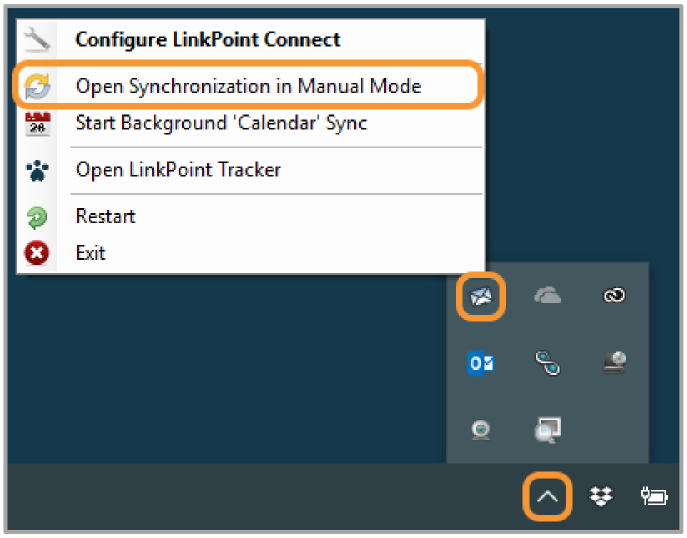


Running a Manual Sync Between Outlook and Salesforce

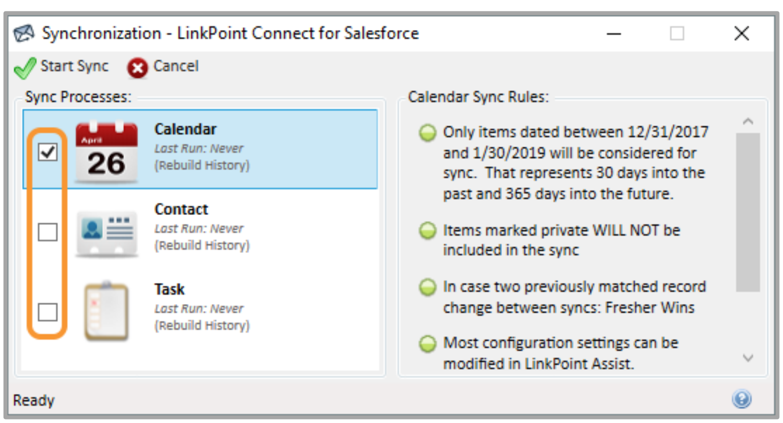
LinkPoint Connect offers users the flexibility to control when and how items are synchronized between Microsoft Outlook and Salesforce. In this section, you will learn how to use Manual Sync to synchronize between Outlook and Salesforce.

Example: In this example, we will demonstrate how to run to a manual sync for Calendar Items. The steps are similar to run a manual sync for Contacts and Tasks.

1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Open Synchronization in Manual Mode**.

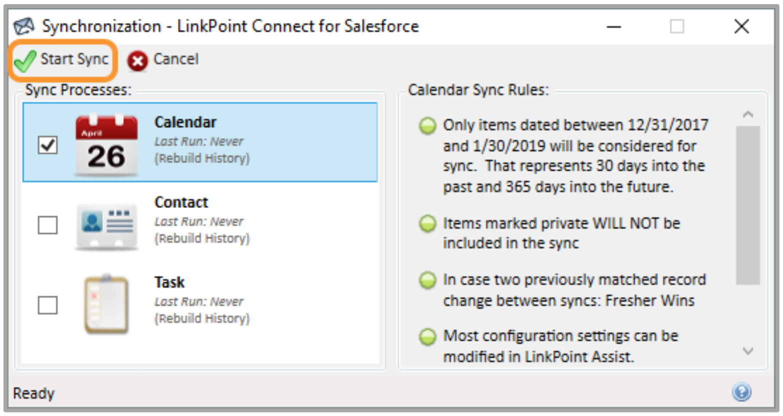


2 Select the **Calendar** checkbox. Deselect any other items you do not want to sync at this time.



Tip: LinkPoint Connect will only sync one-to-one between an Outlook Calendar and Salesforce. This means that while you may have access to more than one Outlook Calendar (i.e. your Calendar, a team or group Calendar), you can only choose one Calendar to sync with Salesforce. Note that if you choose to sync with a shared Outlook Calendar, all items not marked as private will sync to your specific Salesforce Calendar.

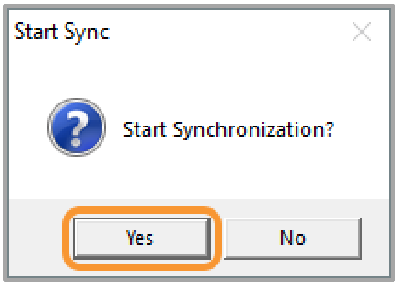
3 Click the **Start Sync** button to proceed.



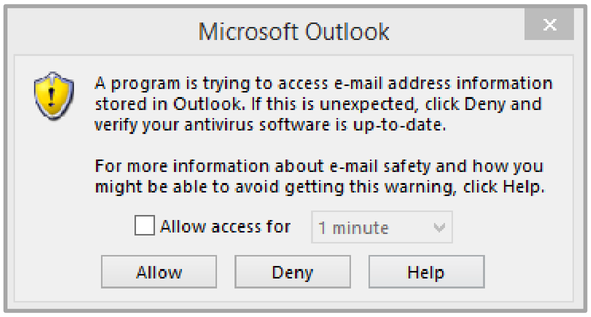
Tip: You will have a chance to review and confirm the items to be synchronized before the tool actually runs the synchronization process.

Additional Resources: Several default **Calendar Sync Rules** are applied as part of the sync process. These settings can be configured using LinkPoint Assist.

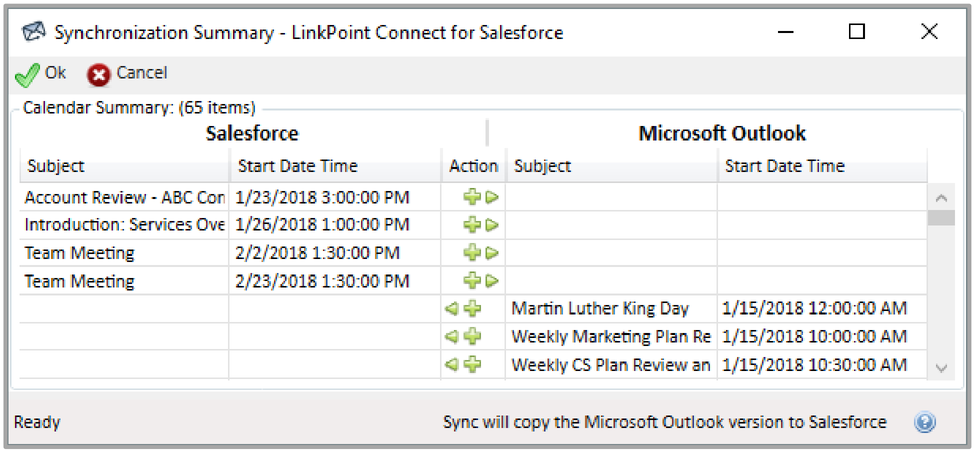
4 Click **Yes** in the Start Sync dialogue box.



Tip: You may need to allow LinkPoint Connect to access Microsoft Outlook depending on your system settings. This message often appears when users do not have antivirus activated or updated.



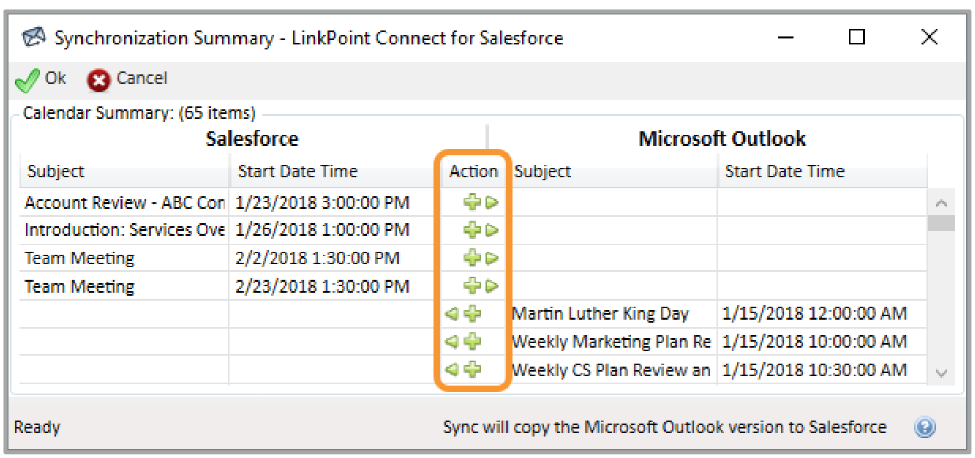
5 Review the **Synchronization Summary** window to see a list of all new or updated Calendar items that match the established sync criteria. Items that exist in Salesforce appear on the left. Items that exist in Microsoft Outlook appear on the right.

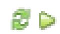


Tip: Note that the Calendar item will sync over to your Salesforce Calendar during the sync but will not sync the meeting invite to each invitees/attendee record in Salesforce due to Salesforce restrictions. If you would like to view the list of invitees for Calendar items, the LinkPoint360 Professional Services Team can configure LinkPoint Connect to include the invitee list within the meeting description when it is synced to Salesforce. When the item syncs back to Outlook, the invitee list is removed from the meeting description.

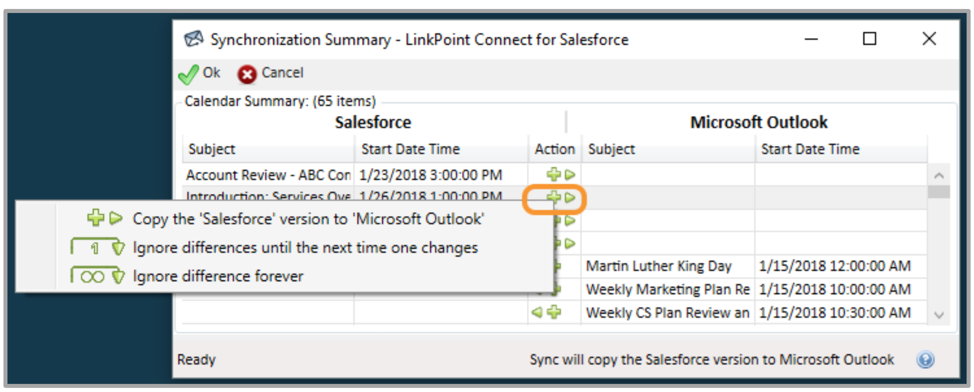
Tip: Attachments included with Calendar items do not sync to Salesforce as part of the sync process. You will be able to see the file names of the attachments that were included, but these attachments remain in Microsoft Outlook.

6 Review the icons in the **Action** column to determine how LinkPoint Connect will sync the displayed items. These actions relate to new, updated, or deleted items either in Salesforce or Microsoft Outlook.



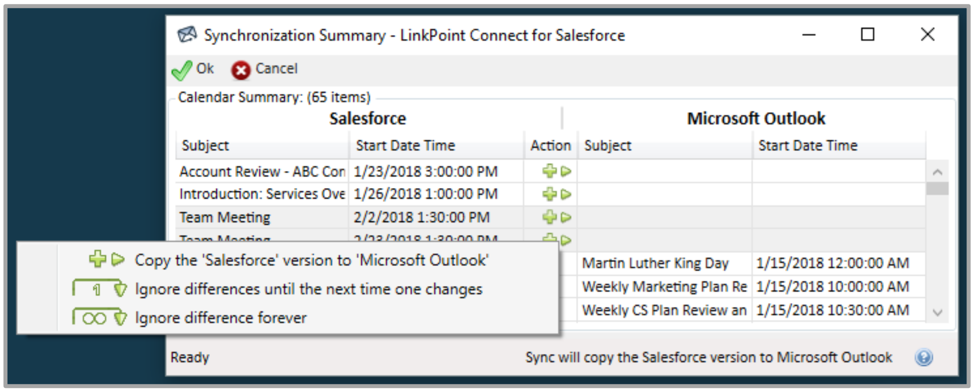
Icon	Action
	New Salesforce item will be added to Microsoft Outlook
	New Microsoft Outlook item will be added to Salesforce
	Updated Salesforce item will be updated in Microsoft Outlook
	Updated Microsoft Outlook item will be updated in Salesforce
	Deleted Salesforce item will be removed from Microsoft Outlook
	Deleted Microsoft Outlook item will be removed from Salesforce
	Indicates a conflict exists between the versions of the item in Microsoft Outlook and Salesforce. The user must indicate which version of the item should be treated as the master.

7 Right click an **Action** icon to launch a list of additional options for the item. Users can choose to **Ignore differences until the next time one changes** or **Ignore difference forever**.



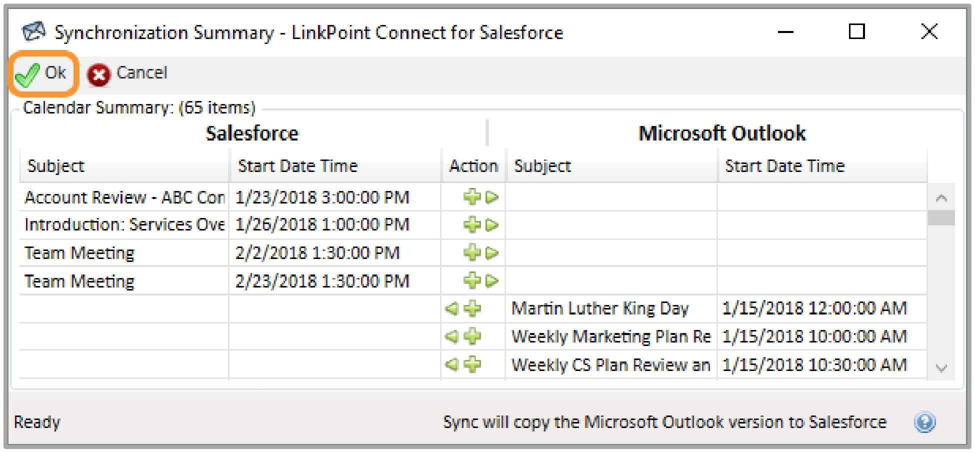
Tip: This is useful for excluding specific items from the sync for a single time or to exclude an item from the sync moving forward. Some users may have appointments that, while not marked as Private, do not need to be or should not be added to Salesforce or Microsoft Outlook.

Tip: You can select multiple Calendar items to apply changes by clicking the items with your mouse while holding the Shift key on your keyboard. Once the items are selected, right click to review the Action options.



8

Click the **Ok** button to confirm the items to sync and to run the actual sync process.



Syncing Calendar Items

LinkPoint Connect is designed to simplify the process of synchronizing your Calendar data between Microsoft Outlook and Salesforce. Users can seamlessly connect existing accounts without the need to manually input sales leads and client information into two separate destinations.

LinkPoint Connect synchronizes Calendars between Microsoft Outlook and Salesforce using two sync types: Manual and Auto. Organizations or users can decide how they would like to manage their sync settings based on how they use Outlook and Salesforce throughout the day. Users can configure LinkPoint Connect to sync automatically using custom settings or manually sync for more control.

Functionality highlights include:

- Customize the flow of information between Outlook and Salesforce
- Configure the synchronization to your specific preferences
- Set the synchronization run times and focus on other tasks while it runs
- Compare your existing Calendar data without manual entry
- Rebuild previous synchronizations to reset where information is stored
- Experience convenient technical support to troubleshoot any synchronization issues
- Manage sync settings easily with LinkPoint Assist

Manual Sync

Users must take action each time they would like to synchronize Calendars using Manual Sync. Users are prompted to confirm the settings for each sync type. Users can run the Manual Sync as often as needed. LinkPoint360 recommends that first-time users run a manual sync before enabling auto sync to avoid duplication issues.

- Configuring LinkPoint Connect Manual Sync Settings
- Running a Manual Sync Between Outlook and Salesforce

Auto Sync

Users can set up their preferred synchronization options within LinkPoint Assist to use the Auto Sync feature. The sync options automate when and how Calendar items move between systems. These settings are configurable per user or can be configured the same way for an organization by LinkPoint360 Professional Services.

- Configuring LinkPoint Connect Auto Sync Settings
- Running Background Synchronization with Auto Sync Settings

Additional Resources

- Relating an Outlook Calendar Item to a Salesforce Record
- Using Smart Link to Relate Outlook Calendar Items to Salesforce
- Rebuilding LinkPoint Connect Sync History

Syncing Contacts

LinkPoint Connect is designed to simplify the process of synchronizing your Contacts data between Microsoft Outlook and Salesforce. Users can seamlessly connect existing accounts without the need to manually input sales leads and client information into two separate destinations.

LinkPoint Connect synchronizes Contacts between Microsoft Outlook and Salesforce using two sync types: Manual and Auto. Organizations or users can decide how they would like to manage their sync settings based on how they use Outlook and Salesforce throughout the day. Users can configure LinkPoint Connect to sync automatically using custom settings or manually sync for more control.

Functionality highlights include:

- Customize the flow of information between Outlook and Salesforce
- Configure the synchronization to your specific preferences
- Set the synchronization run times and focus on other tasks while it runs
- Compare your existing Contact data without manual entry
- Rebuild previous synchronizations to reset where information is stored
- Experience convenient technical support to troubleshoot any synchronization issues
- Manage sync settings easily with LinkPoint Assist

Manual Sync

Users must take action each time they would like to synchronize Contacts using Manual Sync. Users are prompted to confirm the settings for each sync type. Users can run the Manual Sync as often as needed. LinkPoint360 recommends that first-time users run a manual sync before enabling auto sync to avoid duplication issues.

- Configuring LinkPoint Connect Manual Sync Settings
- Running a Manual Sync Between Outlook and Salesforce

Auto Sync

Users can set up their preferred synchronization options within LinkPoint Assist to use the Auto Sync feature. The sync options automate when and how Contacts move between systems. These settings are configurable per user or can be configured the same way for an organization by LinkPoint360 Professional Services.

- Configuring LinkPoint Connect Auto Sync Settings
- Running Background Synchronization with Auto Sync Settings

Related Articles

- Relating an Outlook Contact to a Salesforce Account
- Syncing Contacts by Teams Between Outlook and Salesforce
- Rebuilding LinkPoint Connect Sync History

Syncing Tasks

LinkPoint Connect is designed to simplify the process of synchronizing your Task data between Microsoft Outlook and Salesforce. Users can seamlessly connect existing accounts without the need to manually input sales leads and client information into two separate destinations.

LinkPoint Connect synchronizes Tasks between Microsoft Outlook and Salesforce using two sync types: Manual and Auto. Organizations or users can decide how they would like to manage their sync settings based on how they use Outlook and Salesforce throughout the day. Users can configure LinkPoint Connect to sync automatically using custom settings or manually sync for more control.

Functionality highlights include:

- Customize the flow of information between Outlook and Salesforce
- Configure the synchronization to your specific preferences
- Set the synchronization run times and focus on other tasks while it runs
- Compare your existing Task data without manual entry
- Rebuild previous synchronizations to reset where information is stored
- Experience convenient technical support to troubleshoot any synchronization issues
- Manage sync settings easily with LinkPoint Assist

Manual Sync

Users must take action each time they would like to synchronize Tasks using Manual Sync. Users are prompted to confirm the settings for each sync type. Users can run the Manual Sync as often as needed. LinkPoint360 recommends that first-time users run a manual sync before enabling auto sync to avoid duplication issues.

- Configuring LinkPoint Connect Manual Sync Settings
- Running a Manual Sync Between Outlook and Salesforce

Auto Sync

Users can set up their preferred synchronization options within LinkPoint Assist to use the Auto Sync feature. The sync options automate when and how Tasks move between systems. These settings are configurable per user or can be configured the same way for an organization by LinkPoint360 Professional Services.

- Configuring LinkPoint Connect Auto Sync Settings
- Running Background Synchronization with Auto Sync Settings

Related Articles

- Rebuilding LinkPoint Connect Sync History

Syncing Contacts by Teams Between Outlook and Salesforce

LinkPoint Connect offers users the flexibility to sync contacts based on a number of available criteria. Many organizations choose to further refine how Contacts sync between systems based on the Contact owner(s) in Salesforce.

Own: Sync only the Contacts that the current user owns in Salesforce plus any contacts assigned to their own private "ContactSync" campaign. LinkPoint Connect is configured this way by default (value: own).

Team: Sync only the Contacts that the current user owns in Salesforce plus any contacts assigned to their own private "ContactSync" campaign, plus all contacts of accounts that the user is a team member of (value: team).

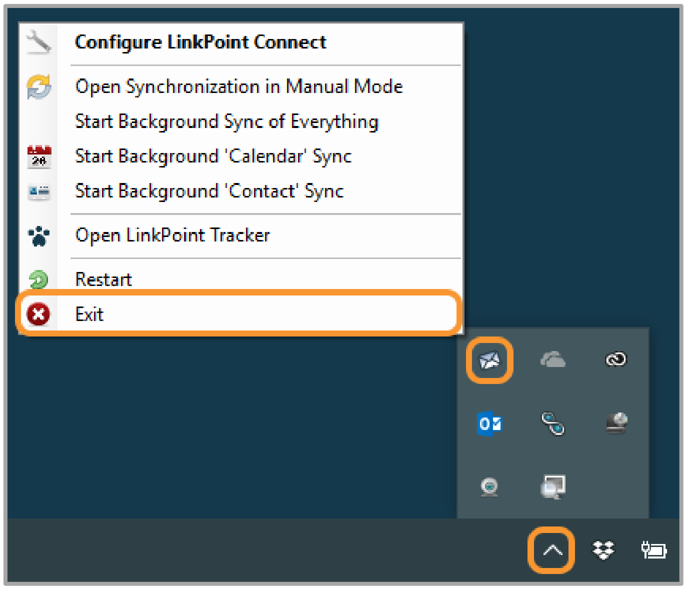
Campaign: Sync any of the Contacts assigned to the user's own private "ContactSync" campaign (value: campaign).

All: Sync all of the contacts in Salesforce (value: all).

In this section, you will learn how to configure LinkPoint Connect to sync Contacts based on those owned by the individual user, by teams, by Salesforce Campaigns, or en masse.

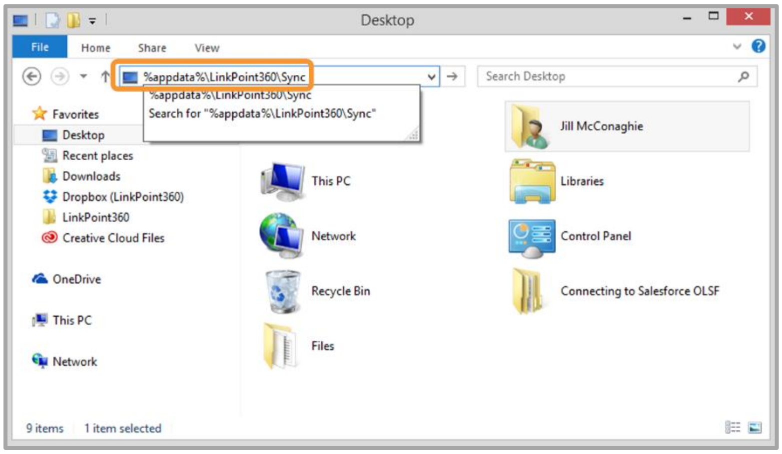
Tip: You can pick which Contacts to sync by assigning them to the **ContactSync** campaign. The campaign must be created once for each user and named **ContactSync**. After assigning selected contacts to the ContactSync campaign, you will need to change the value in the LinkPoint Connect configuration file to reflect desired option.

1 Close both **Microsoft Outlook** and **LinkPoint Assist**, which you can access from the icon in the system tray.



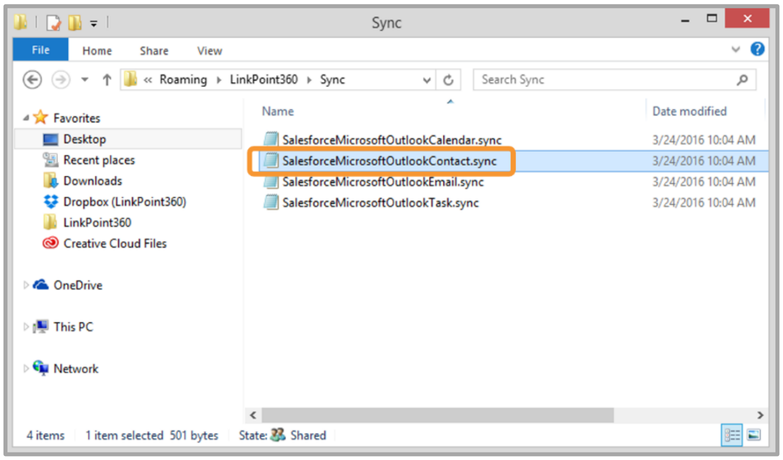
2

Launch the Windows File Explorer and navigate to **%appdata%\LinkPoint360\Sync**.

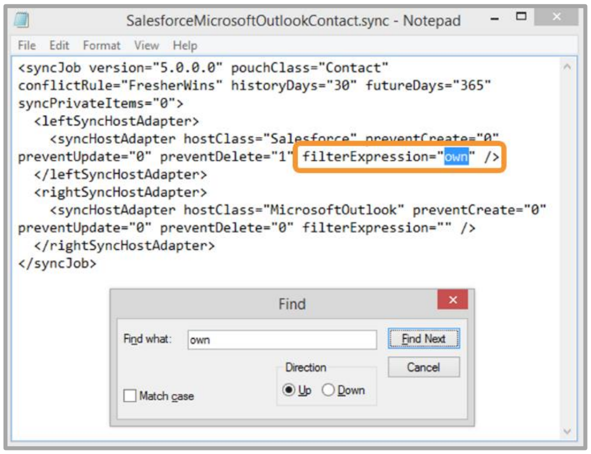


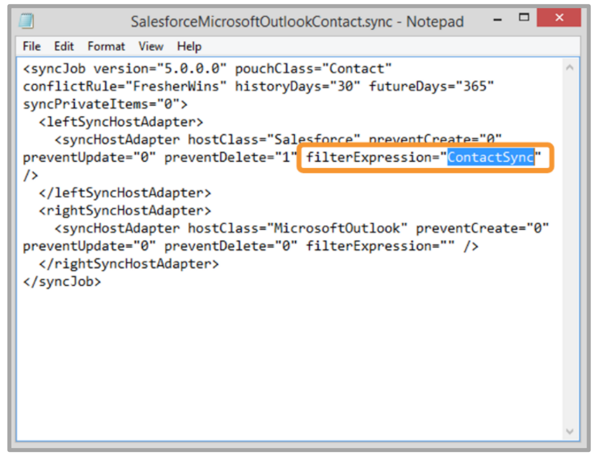
3

Open the file named **SalesforceMicrosoftOutlookContact.sync** in Notepad or a similar plain text editor.



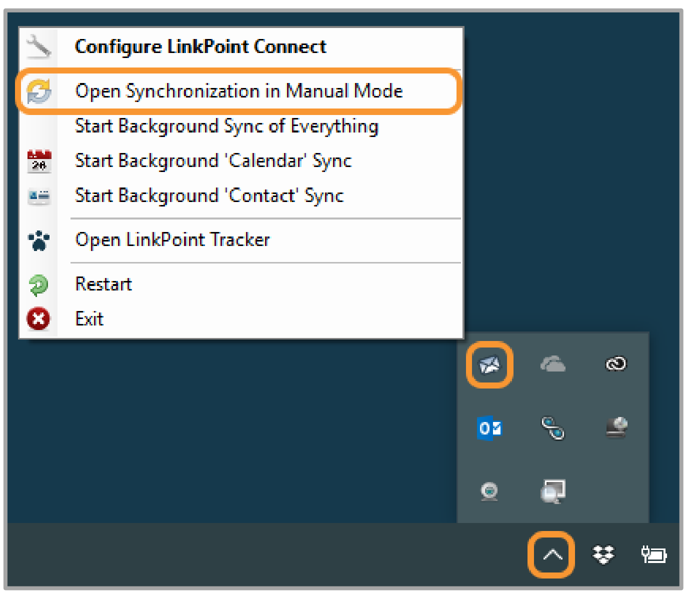
4 Search for the phrase **filterExpression="own"** and replace the word **own** with the keyword you want to use.





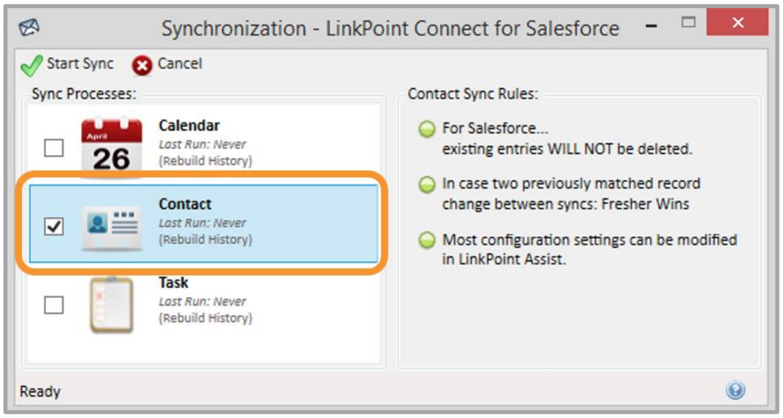
5 Save the file once the changes are complete. Then, open **Microsoft Outlook**.

6 Right click the **LinkPoint Assist** icon in the system tray and select **Open Synchronization in Manual Mode**.



7

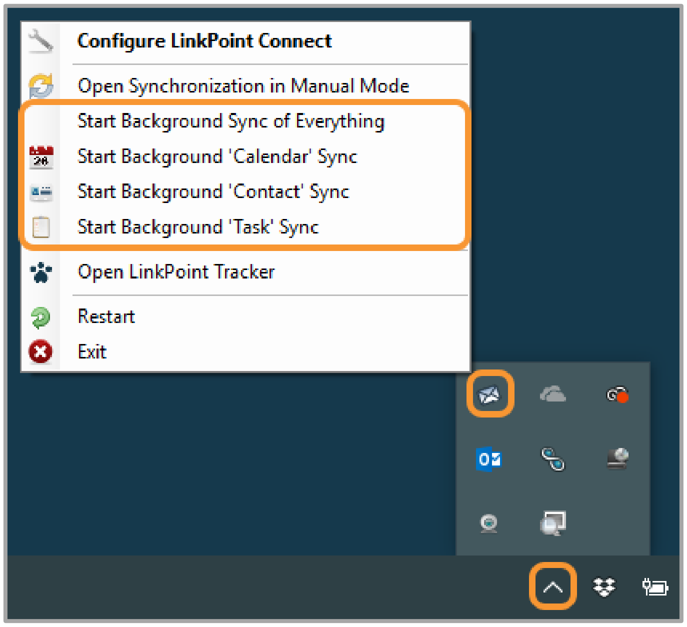
Start the manual sync with the **Rebuilt History** option checked.



Running Background Synchronization with Auto Sync Settings

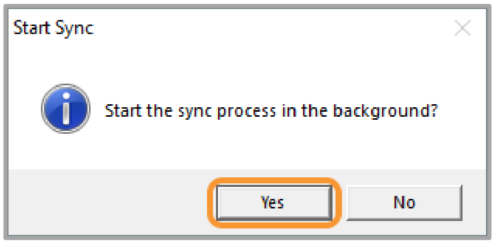
Users can force LinkPoint Connect to run a synchronization in the background based on existing Auto Sync rules at any time. In some cases, users set the Auto Sync frequency to longer intervals between each sync. Users may create a batch of appointments or import a list of contacts that they need available in both Outlook and Salesforce sooner than the next sync time. In this section, you will learn how to run background sync.

1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select the **Start Background Synchronization** option as needed for Everything, Calendar, Contact, and Task.



Example: In this example, we will demonstrate how to run to a background synchronization using the **Start Background Sync of Everything** option. The steps are similar to initiate a background sync for Calendar, Contact, and Task.

2 Click **Yes** to confirm the background synchronization.



3 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Start Background Synchronization**.

4 Note that the system will provide a notification if the sync fails. Otherwise, the sync will run in the background with no additional notification or user interaction.

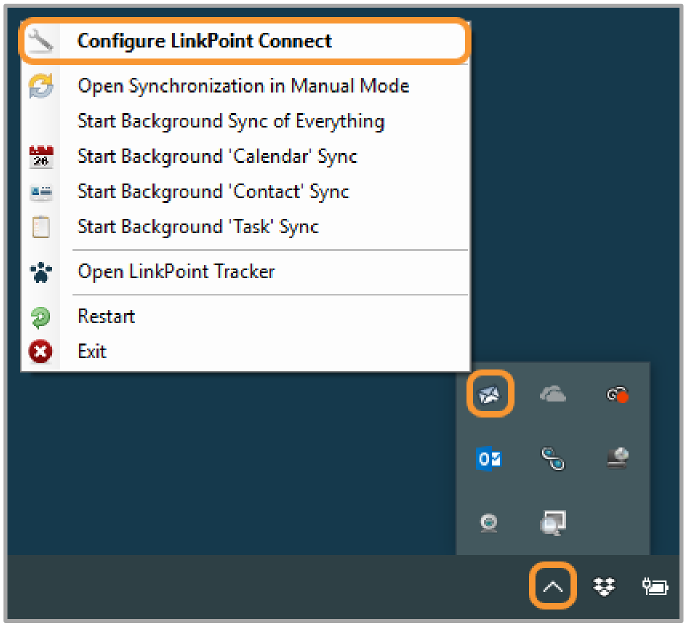
Rebuilding LinkPoint Connect Sync History

LinkPoint Connect enables users to set robust and highly configurable synchronization settings for both manual and automatic synchronization of Contacts, Calendars, and Tasks. In the event that a user syncs their data in a way that does not meet their workflow needs, LinkPoint Connect includes a Rebuild History feature that can be used to reset the prior synchronization. Users can then reset their synchronization preferences between Salesforce and Outlook. In this section, you will learn how to use the Rebuild History feature to reset your synchronization settings.

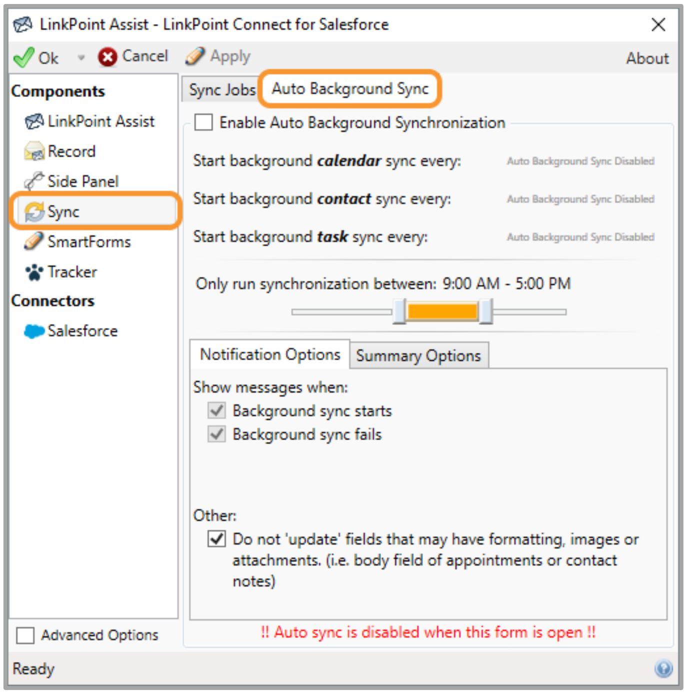
Warning: The Rebuild History feature does not unsync any items that were created, updated, or deleted within Salesforce or Outlook during the last synchronization. Rebuild History removes the relationships created between the systems with the sync preferences to prevent the same incorrect sync from running again.

Example: In this example, we will run the Rebuild History feature on the Task synchronization. The process is the same for using Rebuild History with Calendar and Contact sync.

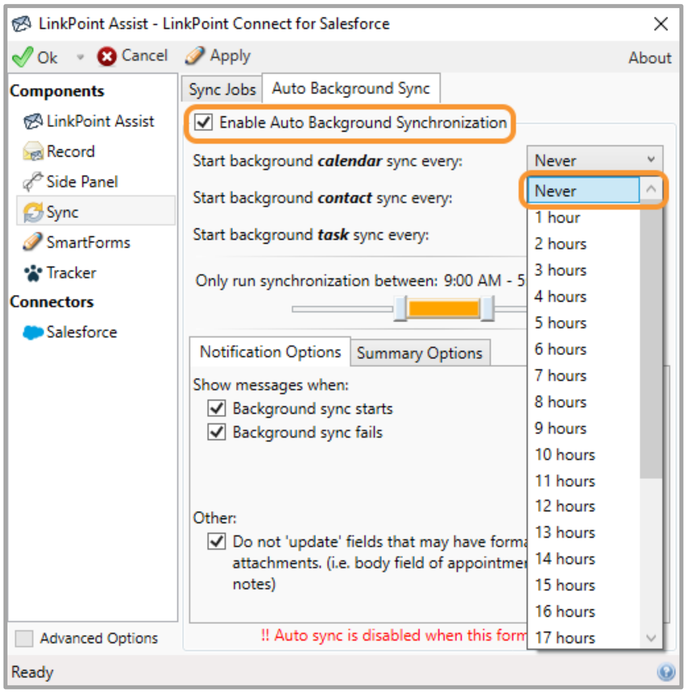
1. Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure LinkPoint Connect.**



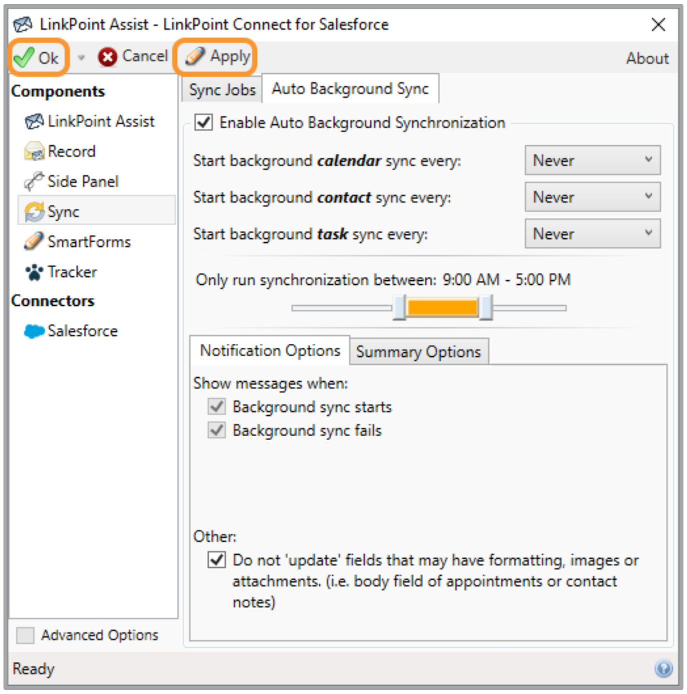
2 Select **Sync** from the **Components** list on the left side of the **LinkPoint Assist** window, and select the **Auto Background Sync** tab.



3 Select **Enable Auto Background Synchronization.** To prevent syncing of Calendar, Contact, and Task, select the **Never** option from the drop-down menu for **Start background *calendar* sync every:, Start background *contact* sync every:,** and **Start background *task* sync every.**

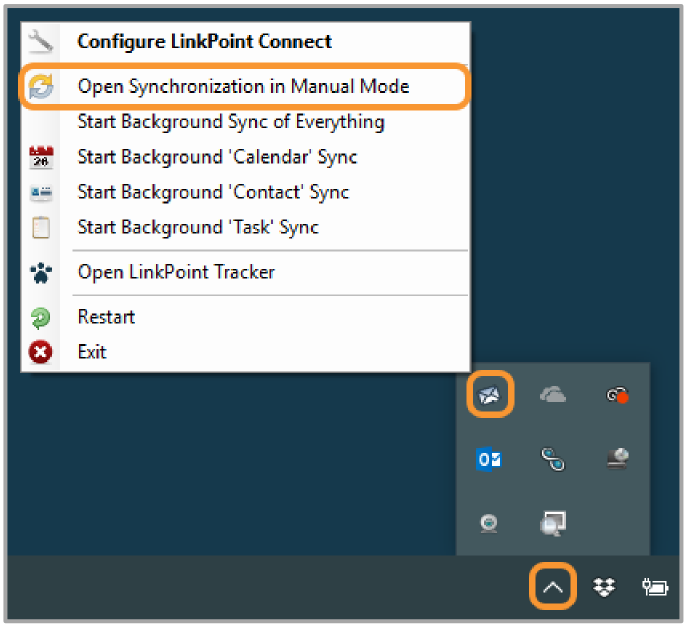


4 Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.

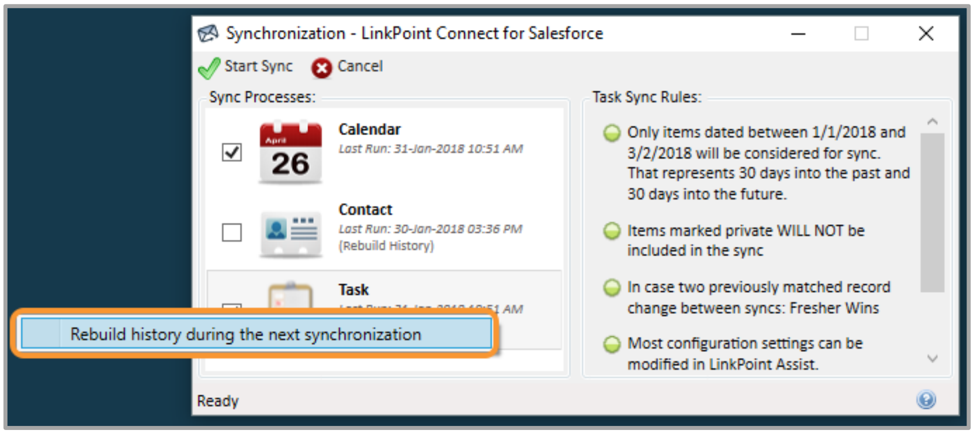


5 Remove or update any items within Salesforce or Outlook that were affected by prior sync as needed.

6 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Open Synchronization in Manual Mode**.

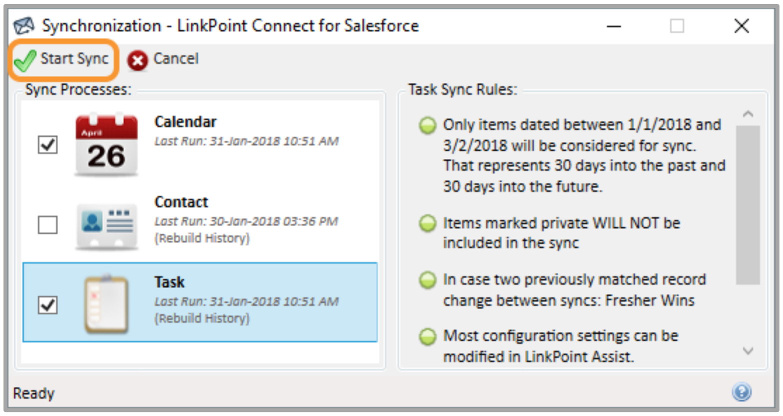


7 Right click the **Calendar**, **Contact**, or **Task** icon in the **Synchronization** window, and select **Rebuild history during the next synchronization**.



Example: In this example, we are demonstrating how to rebuild history for a task.

8 Click the **Start Sync** button and proceed with running the Manual Sync.

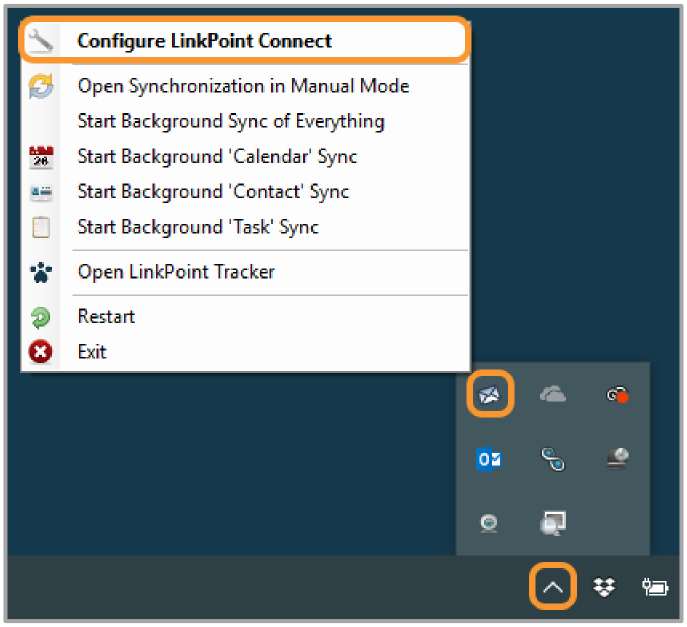


Configuring LinkPoint Connect

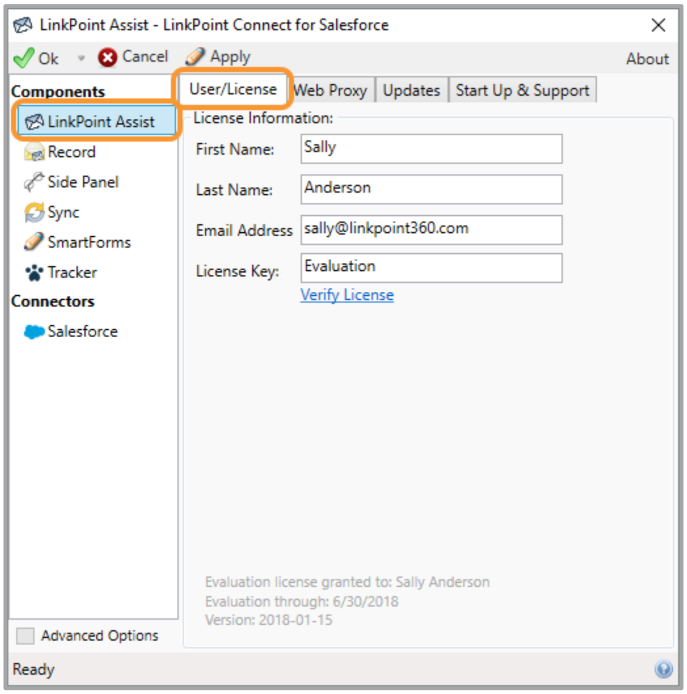
Configuring LinkPoint Assist

LinkPoint Assist includes the configuration settings that apply to features throughout LinkPoint Connect. Various settings are available to manage how LinkPoint Connect displays Salesforce data, records emails, and syncs information between systems. There are also several useful connectors available for advanced users who want to include even more integration within their LinkPoint Connect Side Panel. In this section, you will learn how to configure general LinkPoint Assist settings for managing License Key, Web Proxy, Updates, and Support.

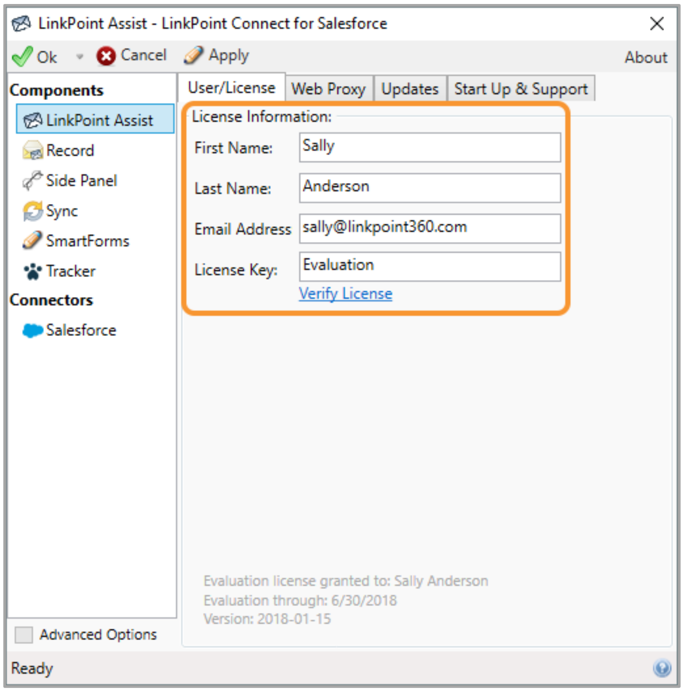
1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure LinkPoint Connect**.



2 Select **LinkPoint Assist** from the **Components** list on the left side of the **LinkPoint Assist** window, and select the **User/License** tab.

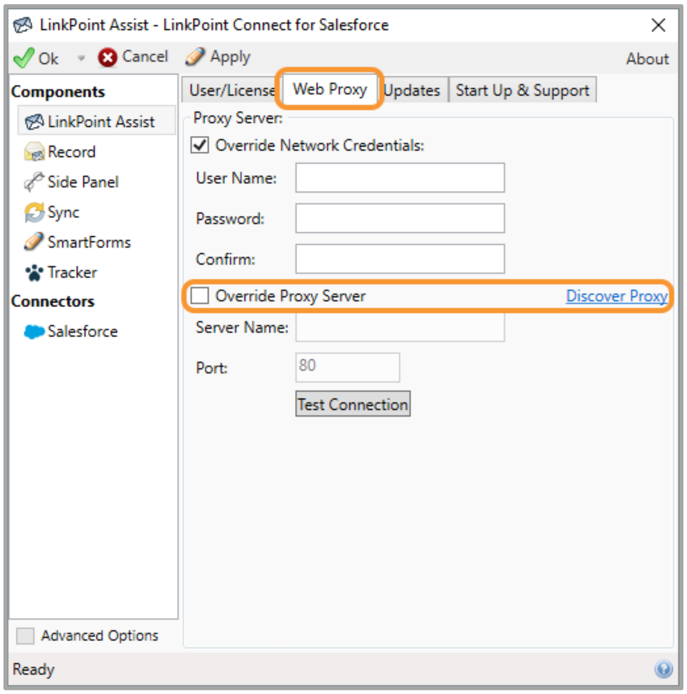


3 Manage **License Information** including user details or select **Verify License** as needed.

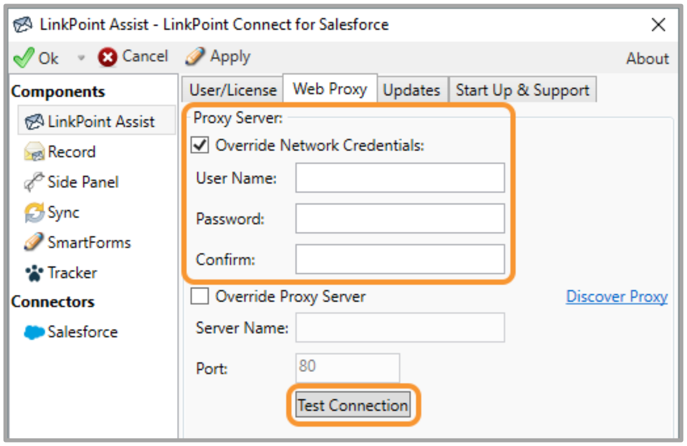


Additional Resource: Refer to the **Entering a License Key** section of this User Guide for more information.

4 Select the **Web Proxy** tab. If working behind a proxy, select the **Override Proxy Server** checkbox and click the **Discovery Proxy** link. This will attempt to automatically detect the proxy server name and fill in the **Server Name** and **Port** fields.

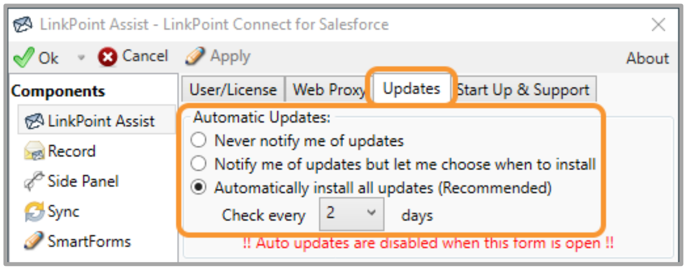


Tip: If you are required to provide credentials to get through the web proxy, select the **Override Network Credentials** checkbox and enter your **User Name** and **Password**. Click the **Test Connection** button to confirm that the Web Proxy is configured correctly.

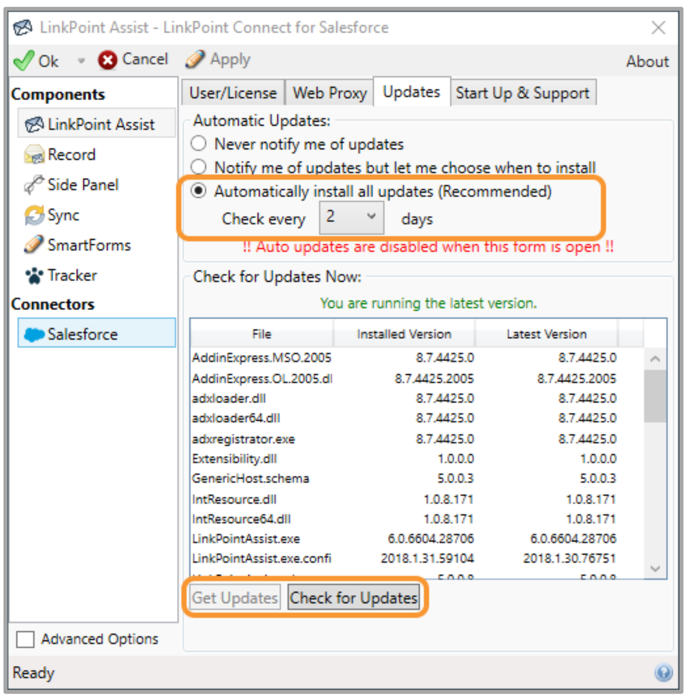


5

Select the **Updates** tab and select an option for **Automatic Updates**. Users can choose to let updates run automatically, approve updates before they are installed, or prevent updates altogether. Users can also set how frequently the software should check for updates with the **Check every X days** drop-down list.

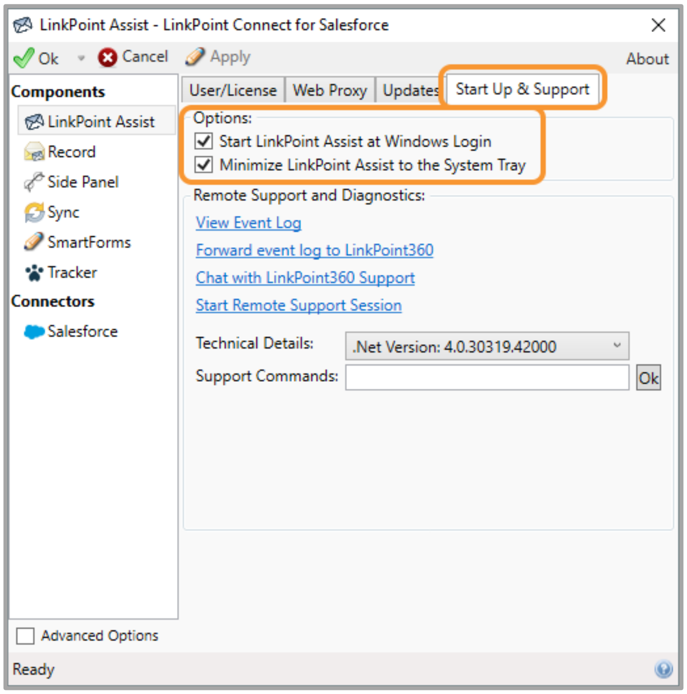


Tip: LinkPoint Connect is set by default to **Automatically install all updates** and will check for updates every two days. If you change the Automatic Updates settings, you can use the **Check for Updates** and **Get Updates** buttons at the bottom of the LinkPoint Assist window.



6

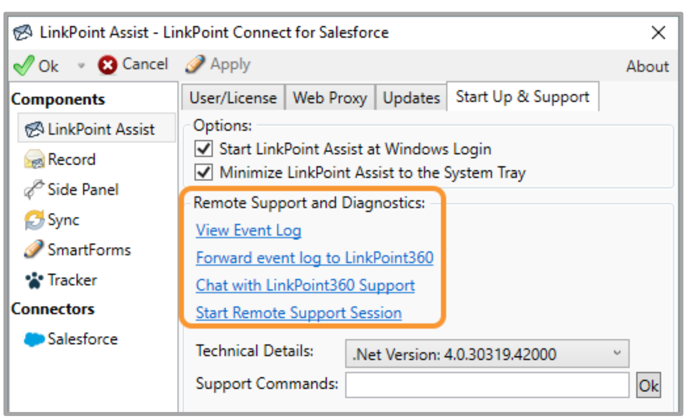
Select the **Start Up & Support** tab. Select or deselect the options to **Start LinkPoint Assist at Windows Login** and to **Minimize LinkPoint Assist to the System Tray** based on user preference.



7

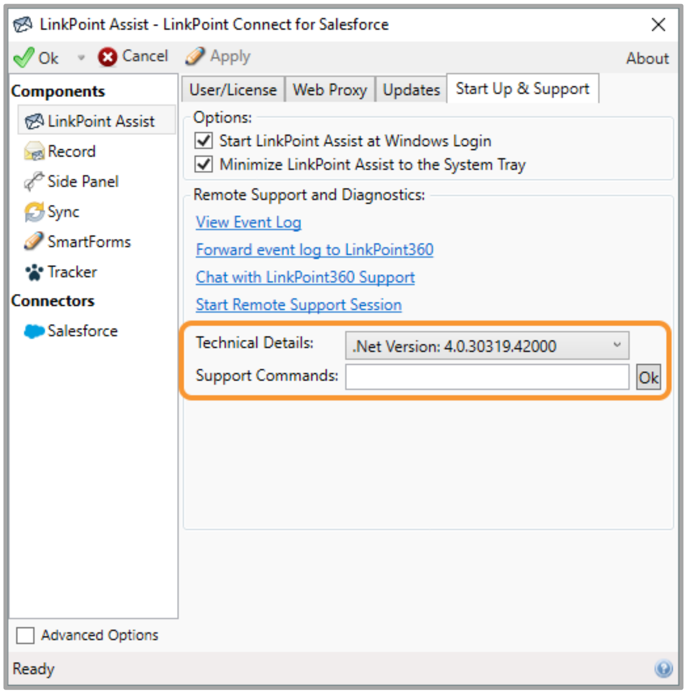
Select from available **Remote Support and Diagnostics** options when working with or reaching out to the LinkPoint360 Support Team.

- **View Event Log:** Click to generate an event log when requested by LinkPoint360 Support
- **Forward event log to LinkPoint360:** Click to send the event log to LinkPoint360 Support
- **Chat with LinkPoint360 Support**: Click to launch ChatBrowser and reach a live LinkPoint360 Support Team member
- **Start Remote Support Session**: Click to join a GotoMeeting session if you have been provided with a Meeting ID from LinkPoint360 Support.



Tip: The **Start Up & Support** tab includes additional tools used by the LinkPoint360 Support team when troubleshooting issues for customers.

- **Technical Details:** Information about your system to give support personnel insight
- **Support Commands:** Access to run additional support tools and shortcuts



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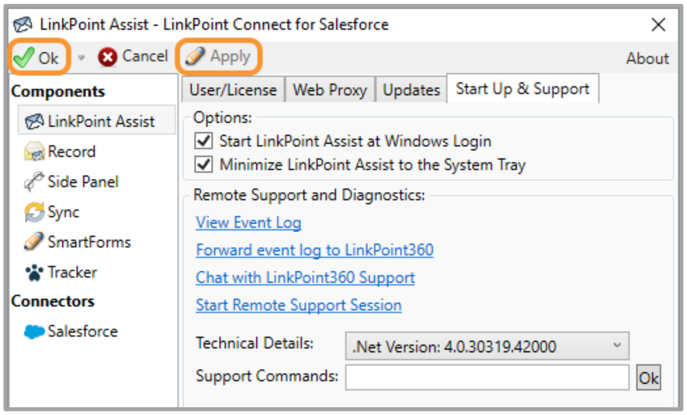
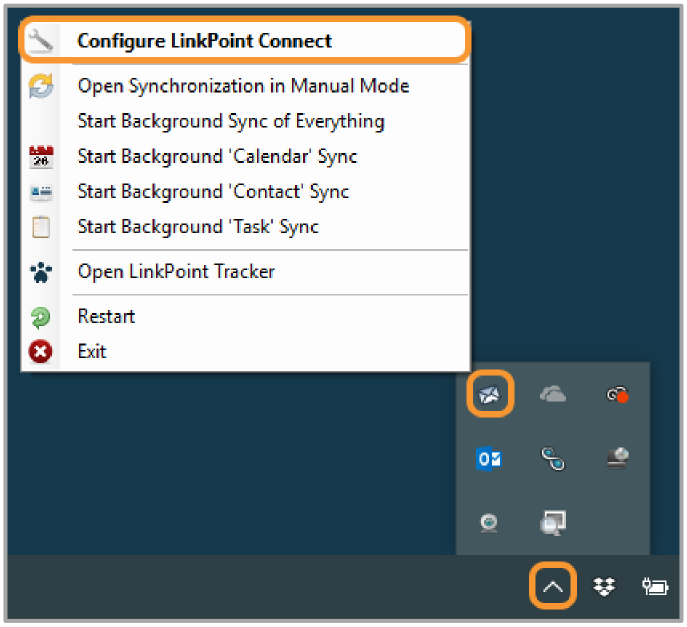
Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



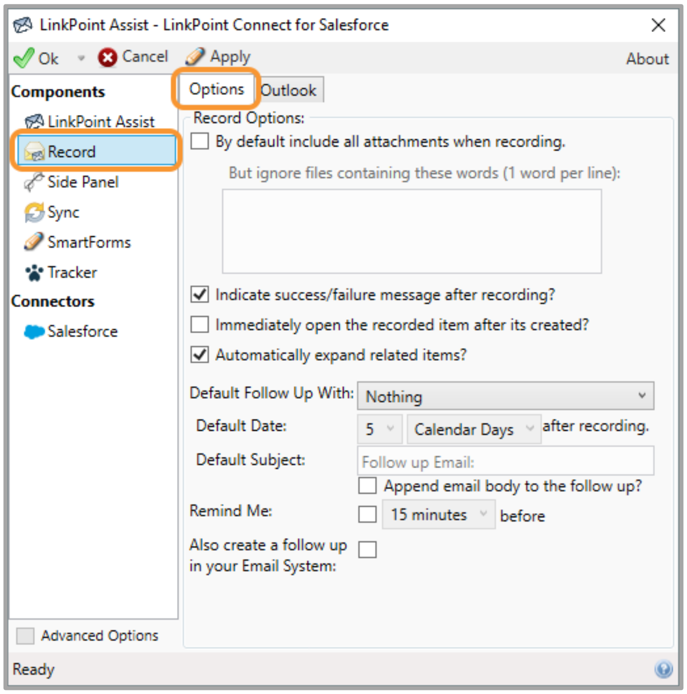
Configuring LinkPoint Connect Record Functionality

LinkPoint Assist guides users through simple configuration processes to adapt LinkPoint Connect to individual and organizational needs. Various settings are available for managing the way that LinkPoint Connect displays Salesforce data, records emails, and syncs information between systems. In this section, you will learn how to modify several settings that impact how, when, and what items are recorded to Salesforce from Outlook.

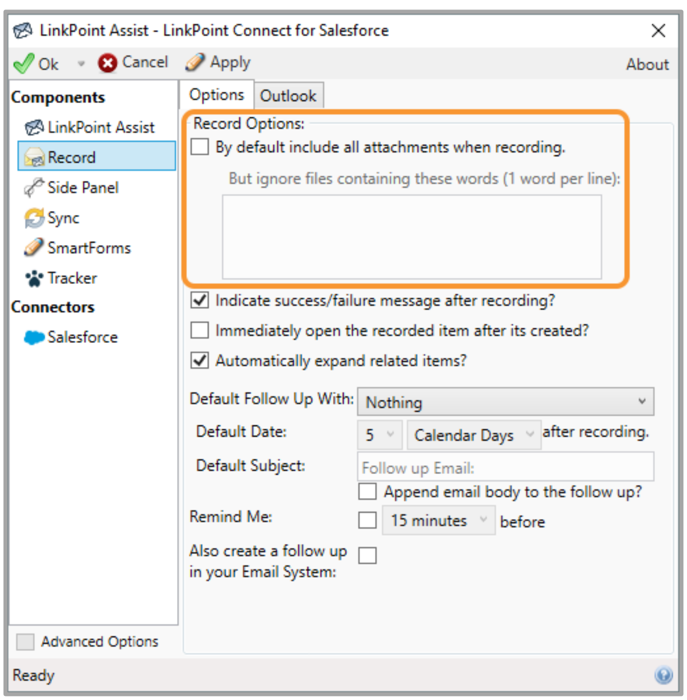
1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure LinkPoint Connect**.



2 Select **Record** from the **Components** list on the left side of the **LinkPoint Assist** window and then select the **Options** tab.



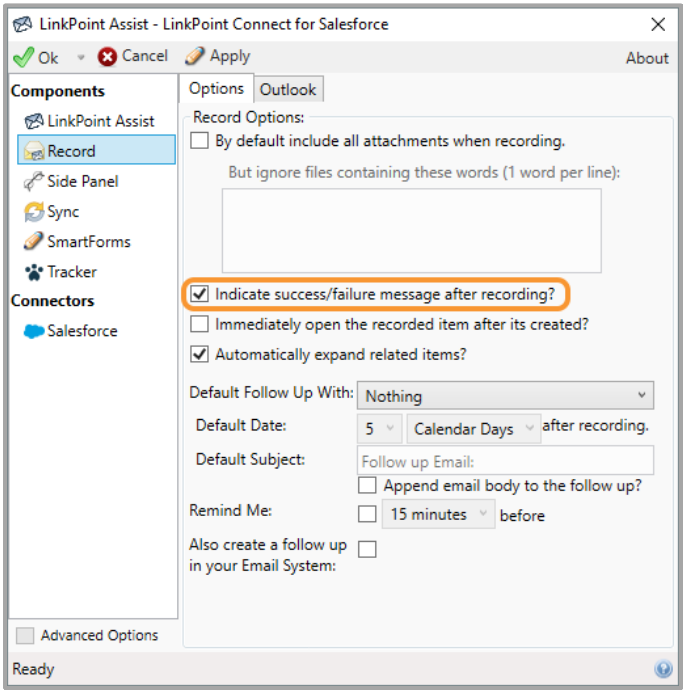
3 Set whether attachments should be recorded by default by selecting the corresponding checkbox. Indicate which file types to exclude from this by entering the file names or types in the field box.



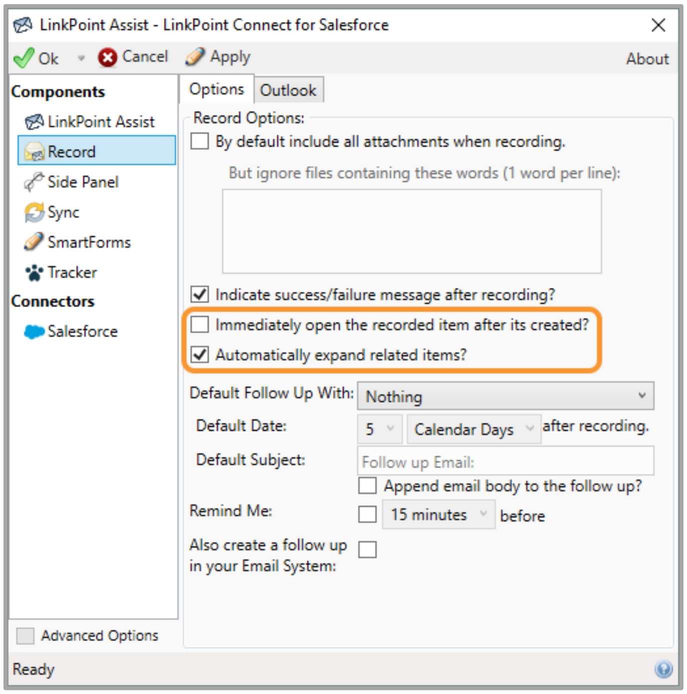
Example: You can list file extensions such as *.png* or *.jpg* to screen out images commonly found in email signatures. You can filter out files with words such as *brochure* or *pricing* to exclude items you commonly send to people that do not need to be saved over and over again in Salesforce, especially if they are already in your Salesforce Document Library.

Tip: Note that by default, this option is turned off to prevent unnecessary items from being recorded to Salesforce and counting against Salesforce storage limits.

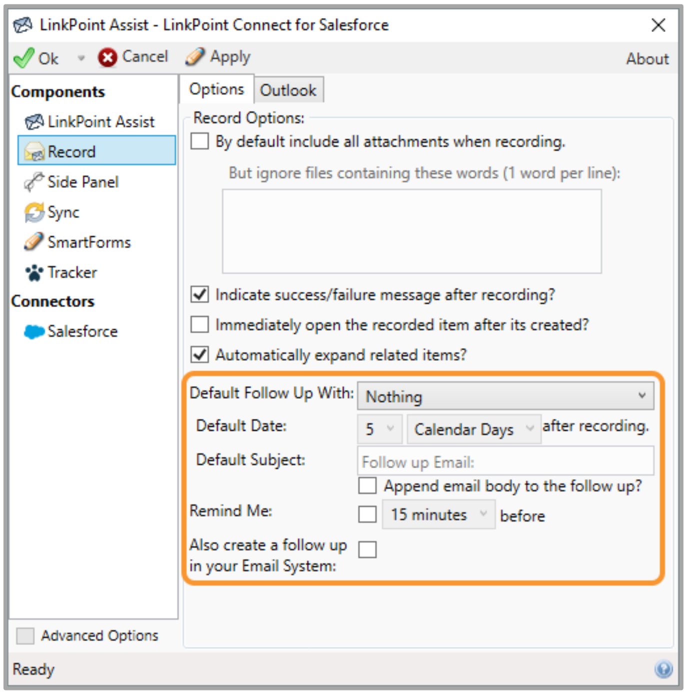
4 Select the **Indicate success/failure message after recording** checkbox to display or hide pop-up notifications after recording items.



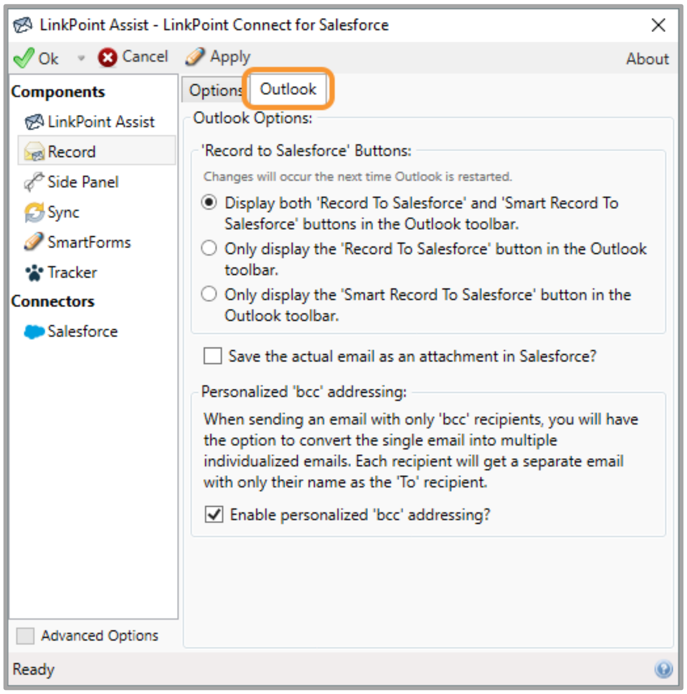
5 Select the additional **Record Options** based on user or company workflow preference.



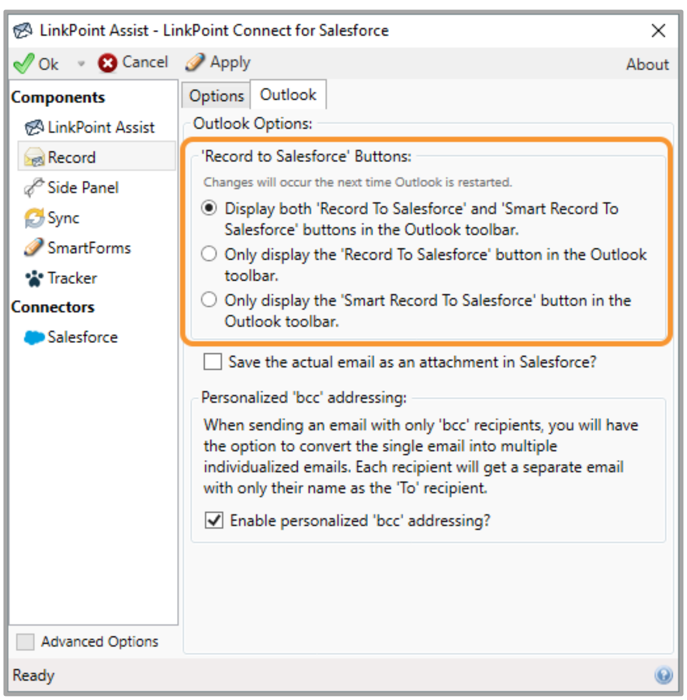
6 Set the prefered default **Follow Up** options for use during the recording process. By default, LinkPoint Connect is configured with *Nothing* as the follow up option.



7 Select the **Outlook** tab.



8 Select the option to display the Record to Salesforce buttons in the Microsoft Outlook ribbon. Choose to display both the Record to Salesforce and Smart Record to Salesforce buttons or only one of the buttons.



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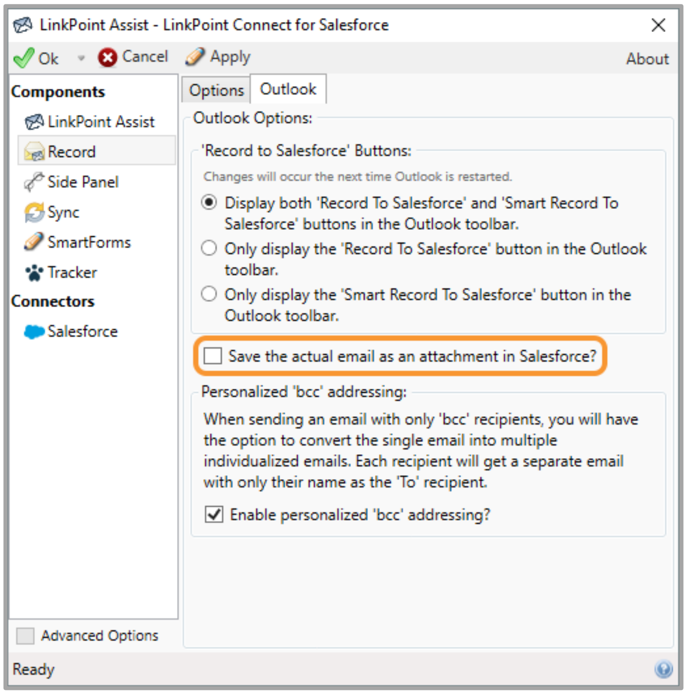
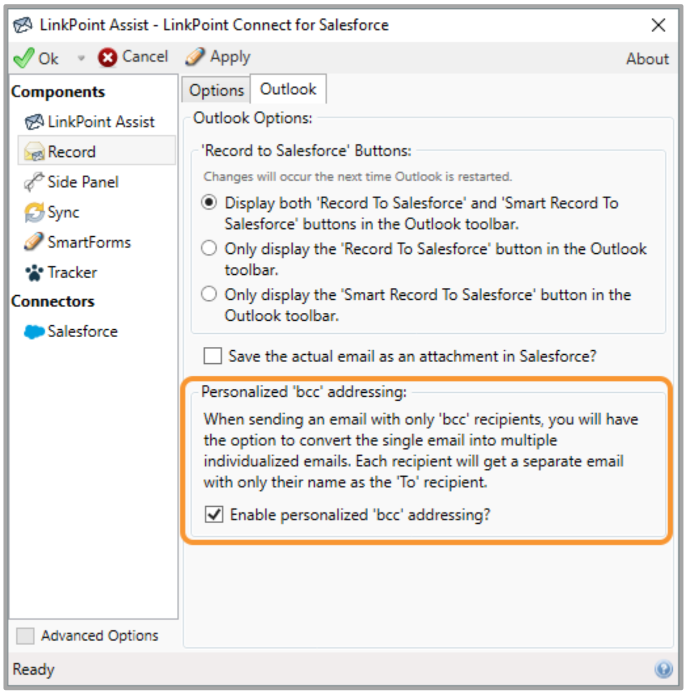
Choose whether to save the email as an attachment in Salesforce when recording. This will add the email to the Activity History as well as the Attachments on the corresponding Salesforce record(s).



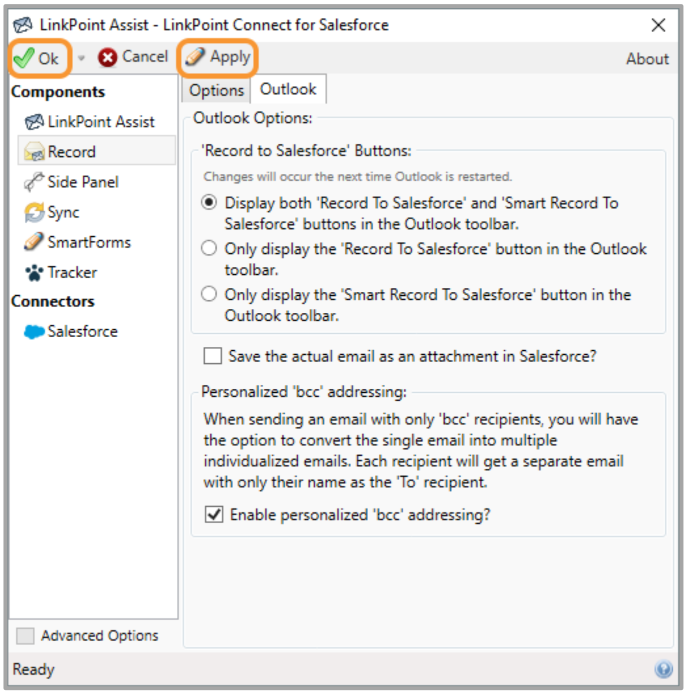
10

Select the checkbox to **Enable personalized 'bcc' addressing?** to enable the option to send a separate email to each individual included in the bcc field on an email.



11

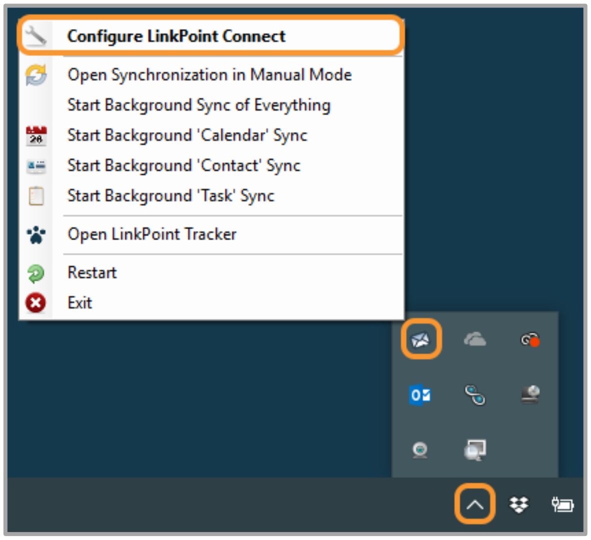
Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



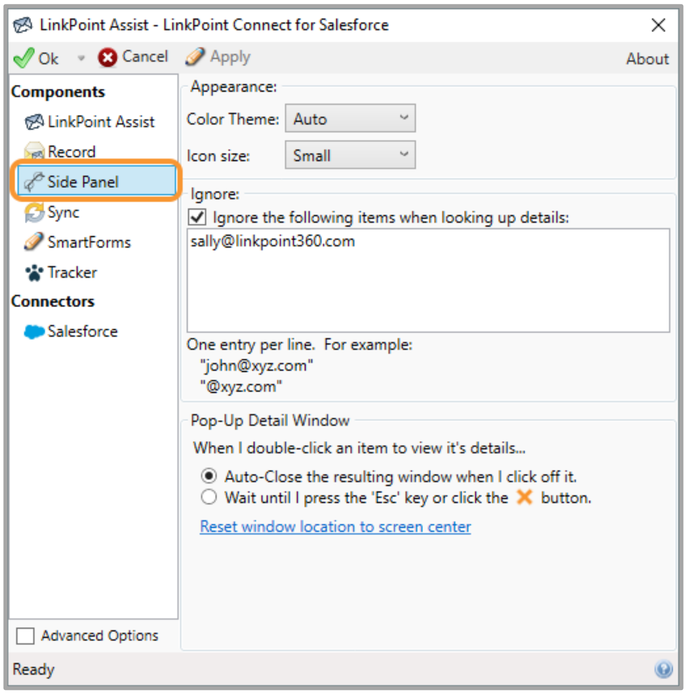
Configuring the LinkPoint Connect Side Panel

LinkPoint Assist guides users through simple configuration processes to adapt LinkPoint Connect to individual and organizational needs. Various settings are available for managing the way that LinkPoint Connect displays Salesforce data, records emails, and syncs information between systems. In this section, you will learn how to modify several settings that impact the display of information in the LinkPoint Connect Side Panel.

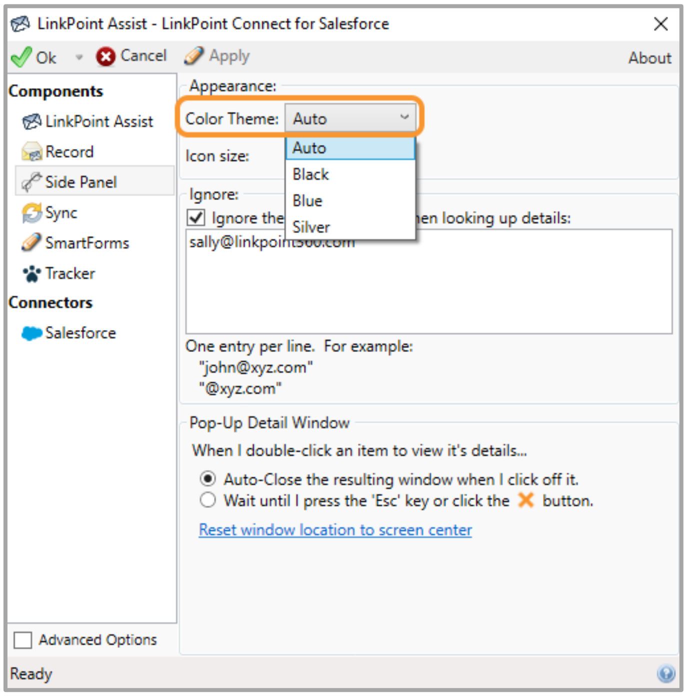
1. Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure LinkPoint Connect**.



2 Select **Side Panel** from the **Components** list on the left side of the **LinkPoint Assist** window.

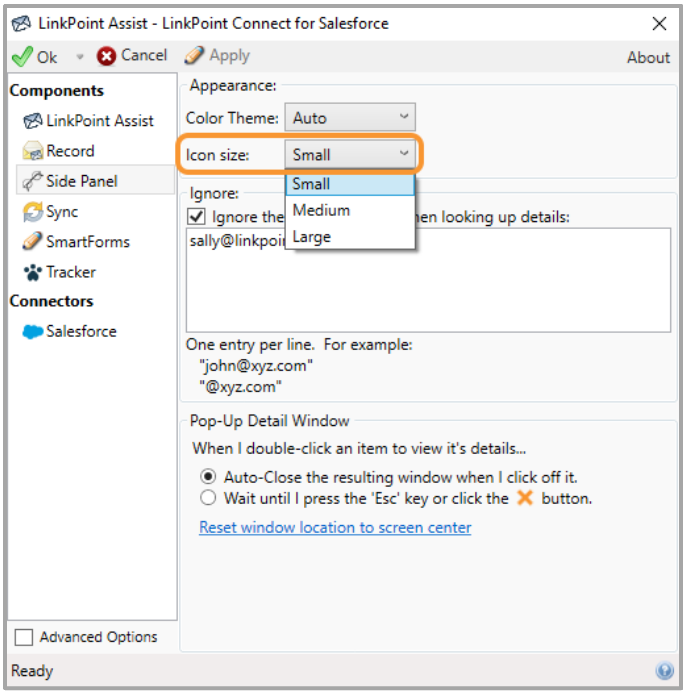


3 Select a **Color Theme** from the drop-down list to change the **Appearance** of the Side Panel. Note that **Auto** is the default option.

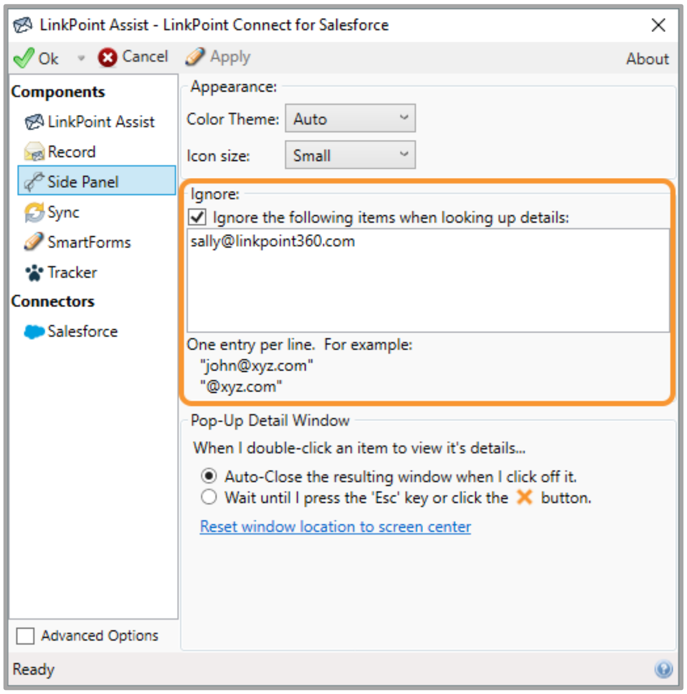


Tip: You may need to restart Microsoft Outlook after updating the Color Theme selection to apply the changes to the Side Panel.

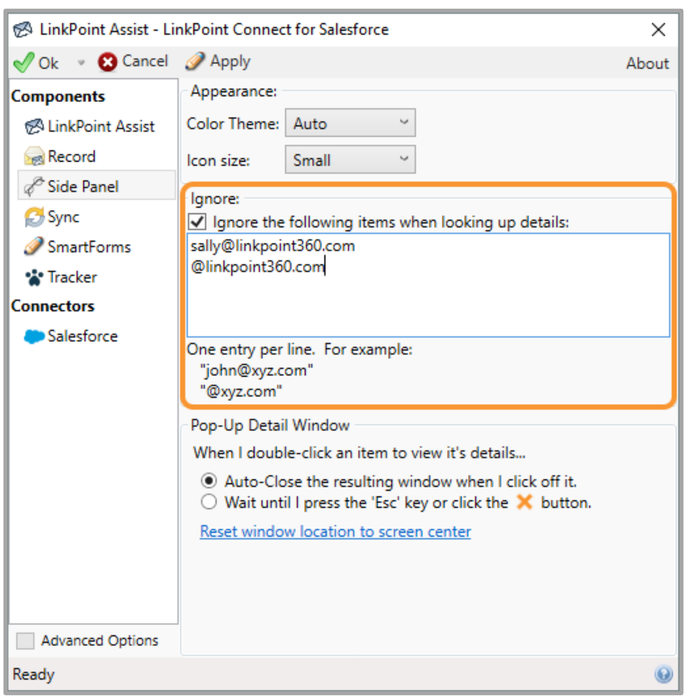
4 Select the **Icon Size** from the drop-down list to change the default size of the icons displayed in the Side Panel. The default size is *Small*.



5 Select the **Ignore the following items when looking up details:** checkbox to specify email addresses to exclude from the Side Panel. Enter the content into the field box with one item on each line.

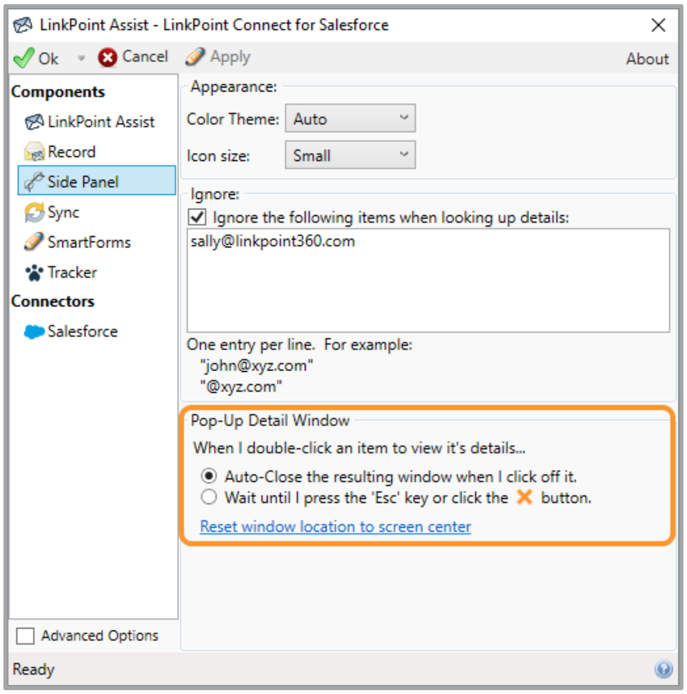


Tip: This is especially useful for excluding yourself or others in your organization from the Search Results or Contact List.



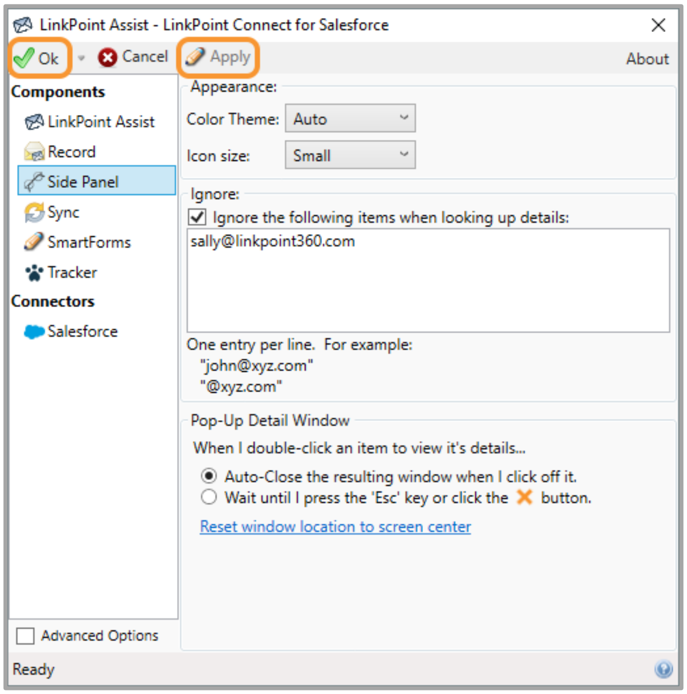
6

Select preferred settings for the **Pop-Up Detail Window** that is displayed when double clicking on items in the Side Panel. The window can be set to close when clicking away from it or when clicking the close icon.



7

Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



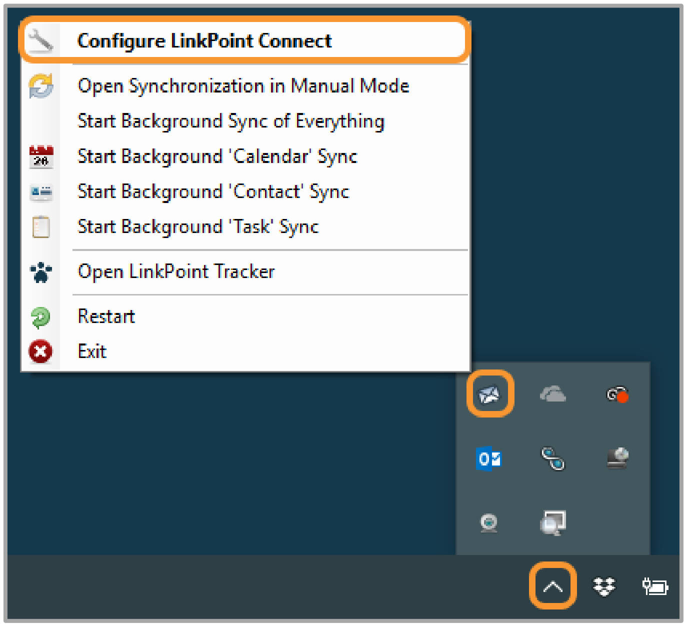
Configuring Smart Forms

Smart Forms allow users to create and update Salesforce records with a customizable interface within their email application. LinkPoint Connect dynamically accesses existing Salesforce Global Actions that are preconfigured. For Salesforce instances that do not include Global Actions, LinkPoint Connect provides a set of starter forms that integrate with standard objects:

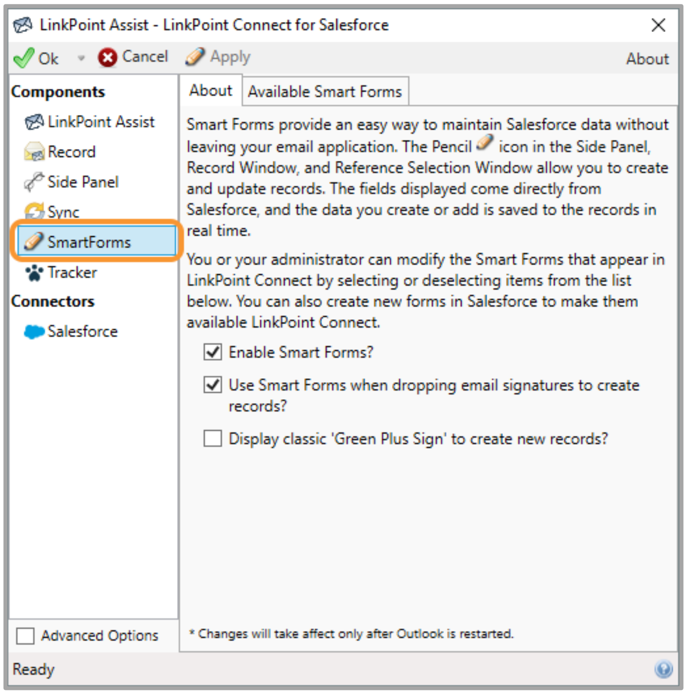
- Accounts
- Cases
- Contacts
- Events
- Leads
- Opportunities
- Tasks

By default, users are able to configure Smart Forms to display or hide the option to update certain object types. In this section, you will learn how to configure the basic access for Smart Forms. If you need additional configuration assistance or access to custom Smart Forms, contact support@linkpoint360.com.

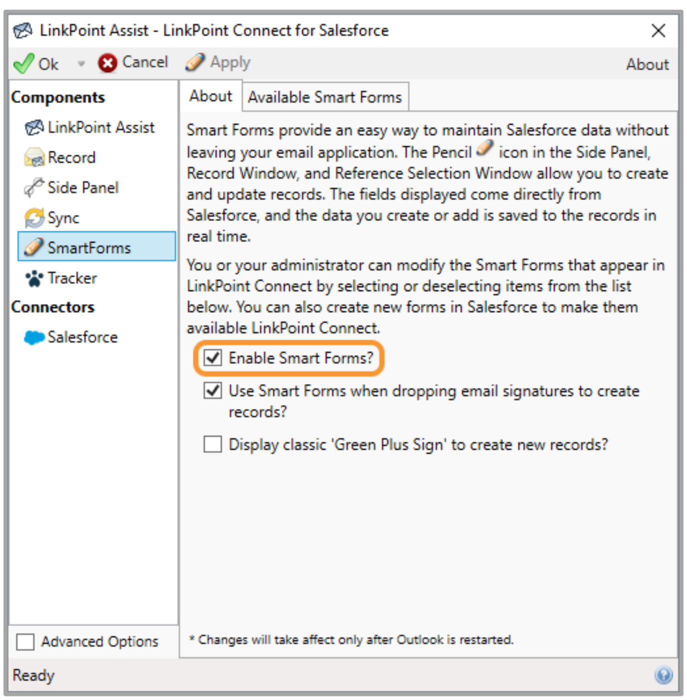
1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure LinkPoint Connect**.



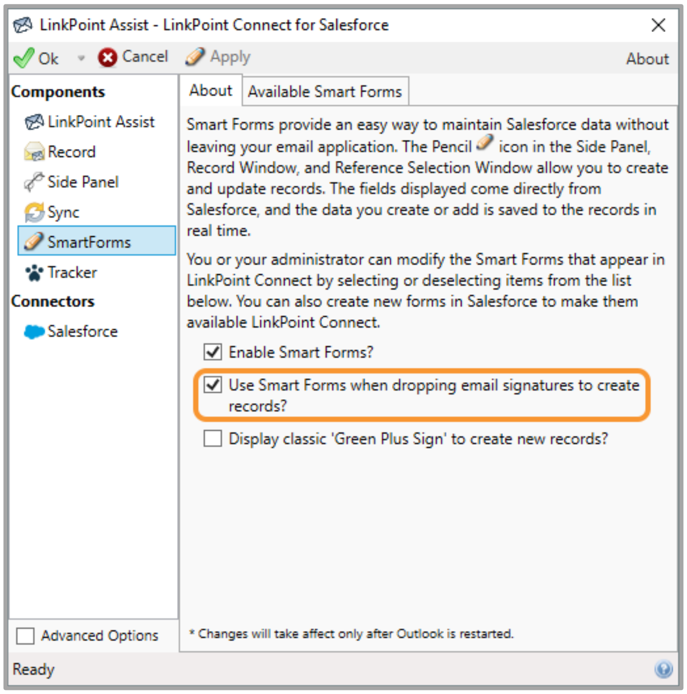
2 Select **Smart Forms** from the **Components** list on the left side of the **LinkPoint Assist** window.



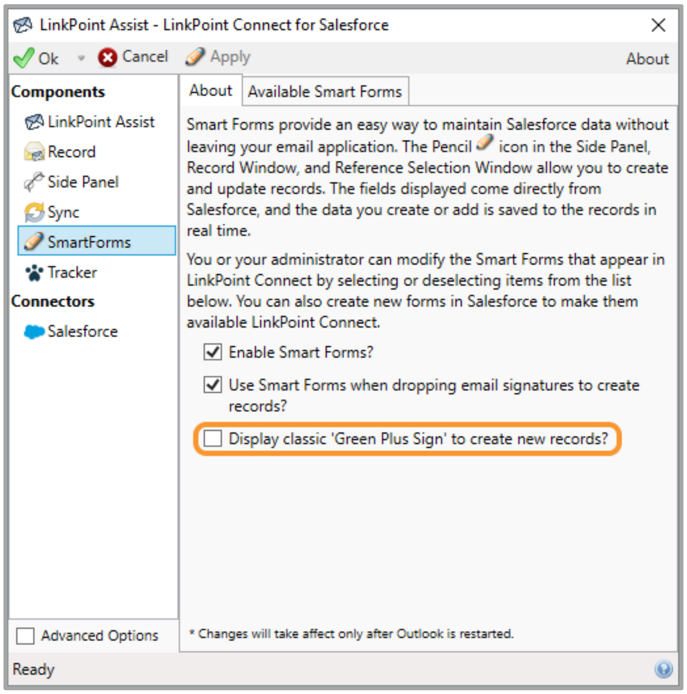
3 Select **Enable Smart Forms** to turn the Smart Forms feature on throughout LinkPoint Connect. Note that this feature is enabled by default. Deselect the option to disable Smart Forms.



4 Select the checkbox to **Use Smart Forms when dropping email signatures to create records?** to enable or disable Smart Forms when using the Drop Zone.

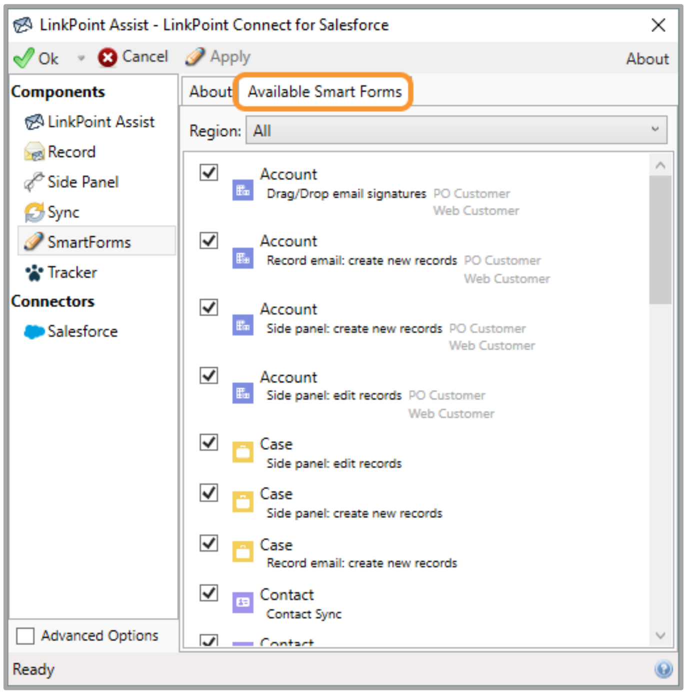


5 Select the checkbox to **Display classic 'Green Plus Sign' to create new records?** to enable the Green Plus Sign throughout the Side Panel as an alternative to creating new Salesforce records.



6

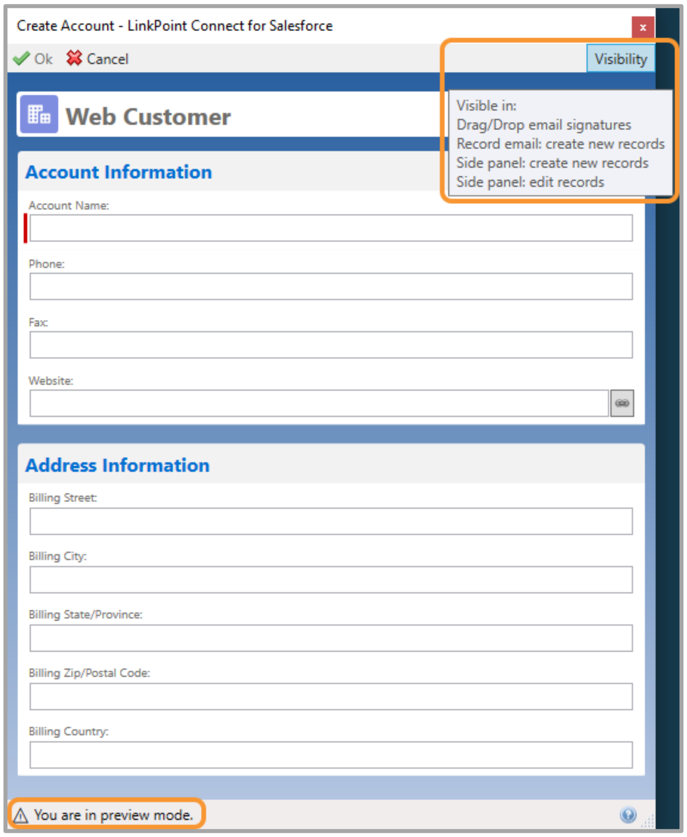
Select the **Available Smart Forms** tab.



7

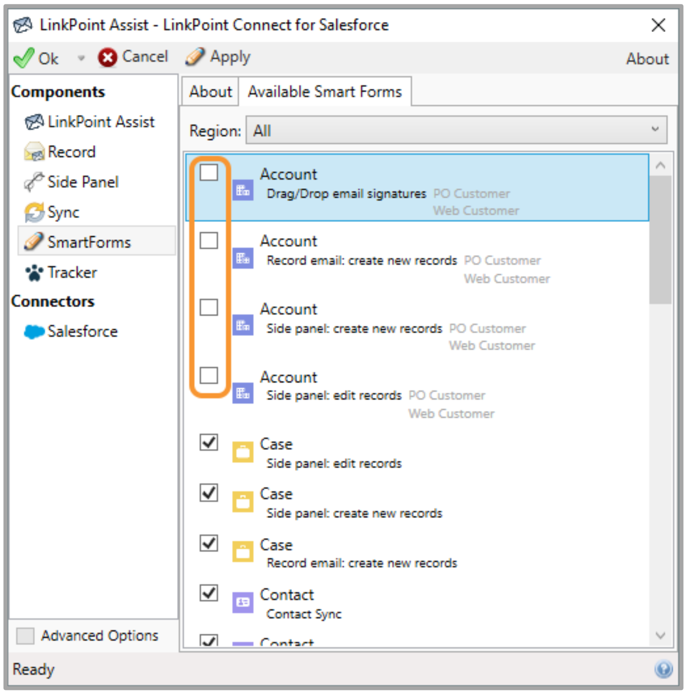
Double click any item in the **Available Smart Forms** list to preview the form and all included fields. This is useful to ensure that the correct forms are enabled.

Tip: In Preview Mode, mouse over the **Visibility** option in the top right corner to see a listing of where the Smart Form will be available within LinkPoint Connect.

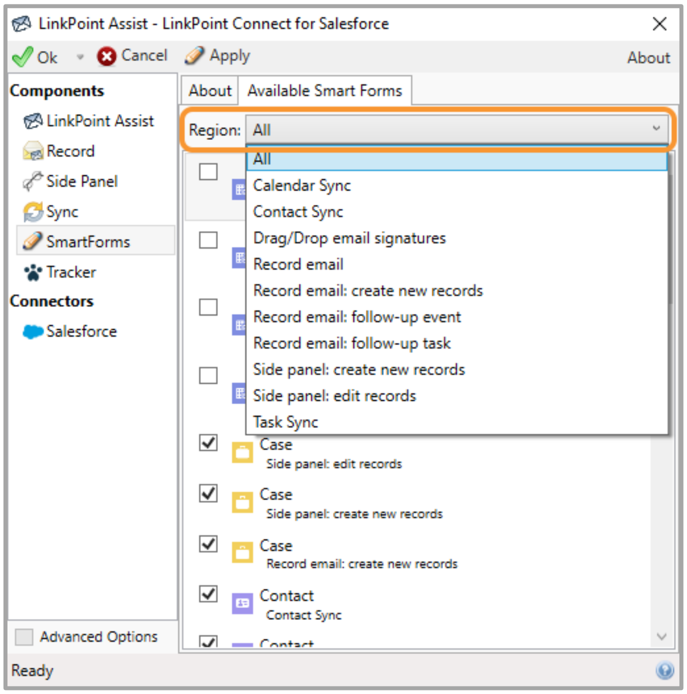


Tip: The Available Smart Forms list is generated by LinkPoint Connect based on your Salesforce environment. If your organization has Global Actions enabled for Accounts, Cases, Contacts, Events, Leads, Opportunities, and Tasks, the corresponding forms will be available for use. If your organization does not use Global Actions, a standard set of forms will be provided by LinkPoint Connect and listed as available. Existing forms within Salesforce always override any default forms included with LinkPoint Connect. Any required fields from Salesforce will be honored within Smart Forms.

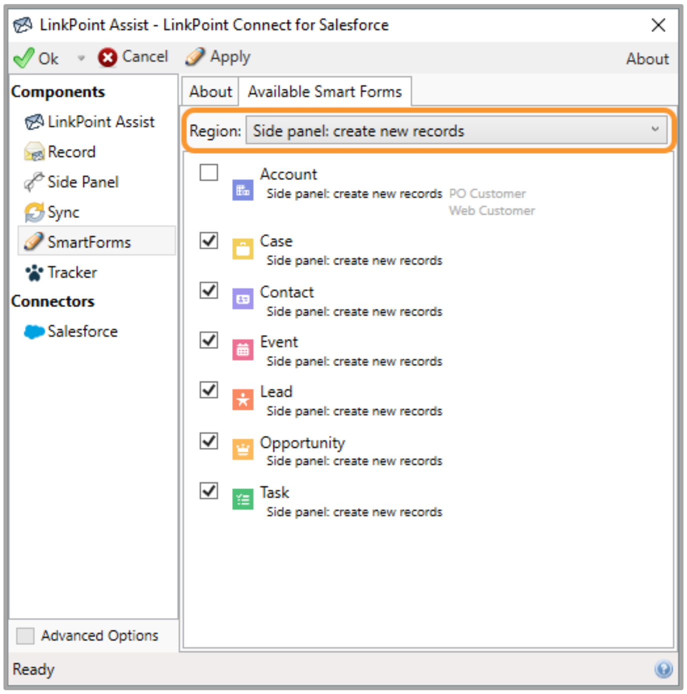
8 Deselect the checkboxes to remove the Salesforce object as an available Smart Form. Each line item lists the Object as well where it appears within LinkPoint Connect and the associated Record Types, where applicable.



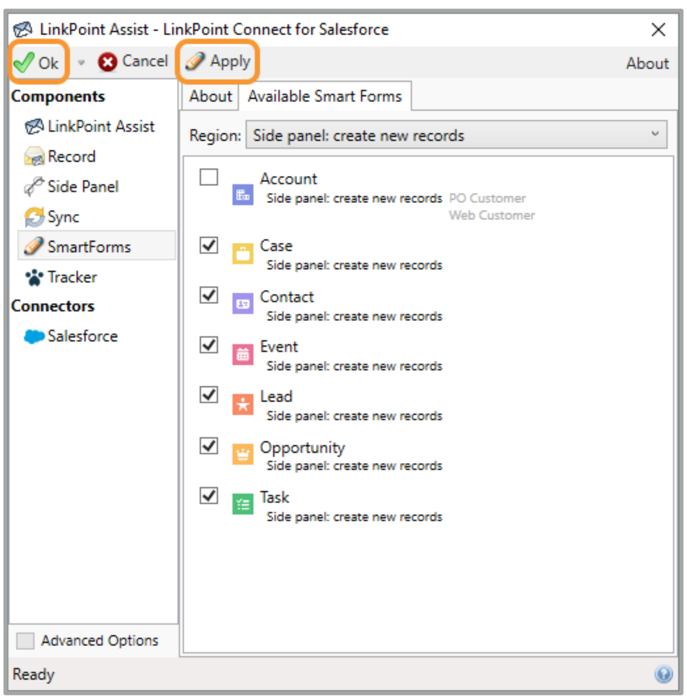
9 Select a **Region** to edit the Smart Forms displayed within a specific section an email in your inbox.



Tip: Use the Region option to customize the Smart Form icon options. View All and select or deselect checkboxes to one-off remove objects as needed.



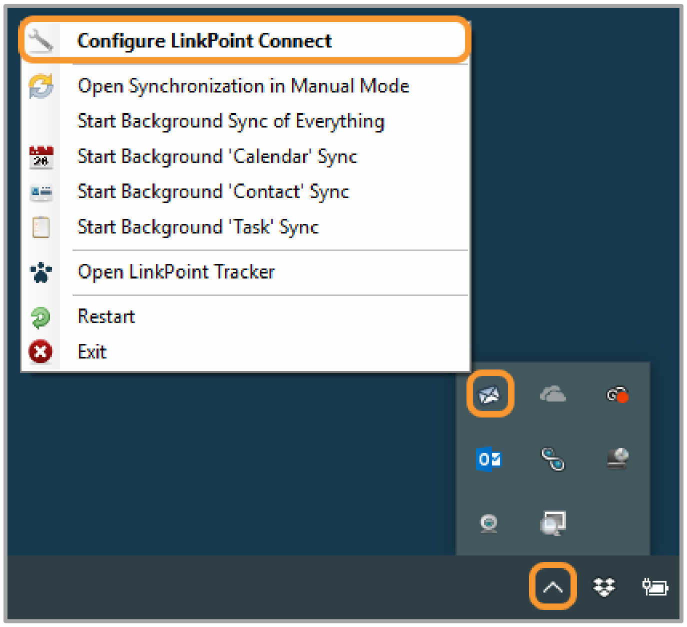
10 Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



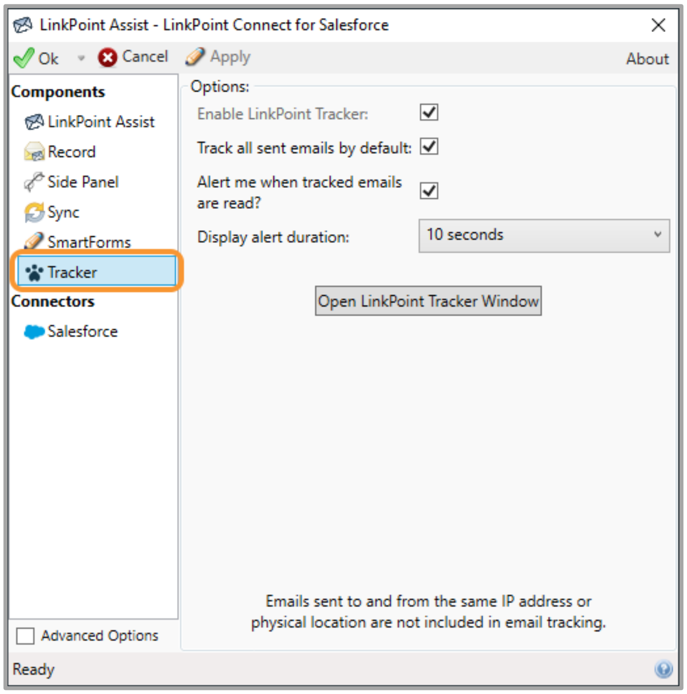
Configuring LinkPoint Tracker

LinkPoint Tracker enables users to track when an outbound email is opened by one or more recipients. With real-time notifications, users can proactively follow up with key leads and contacts. In this section, you will learn how to configure the LinkPoint Tracker within LinkPoint Assist.

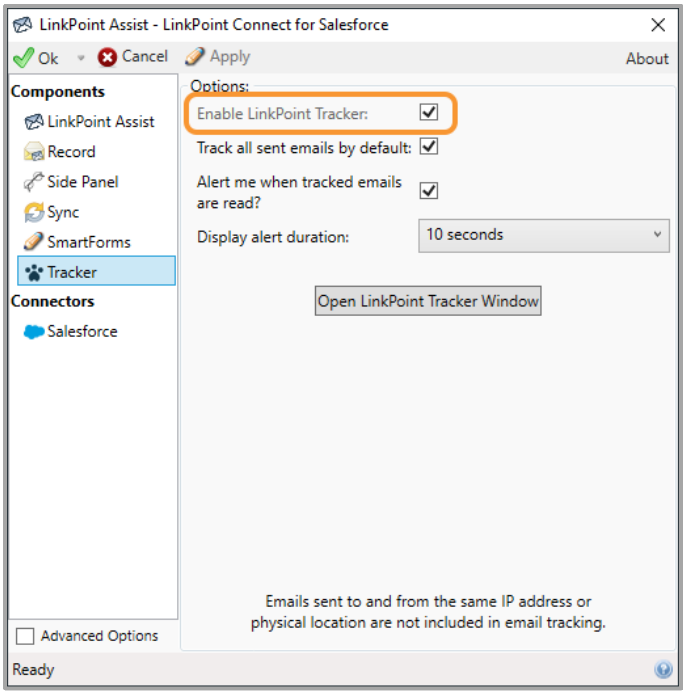
1. Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure LinkPoint Connect**.



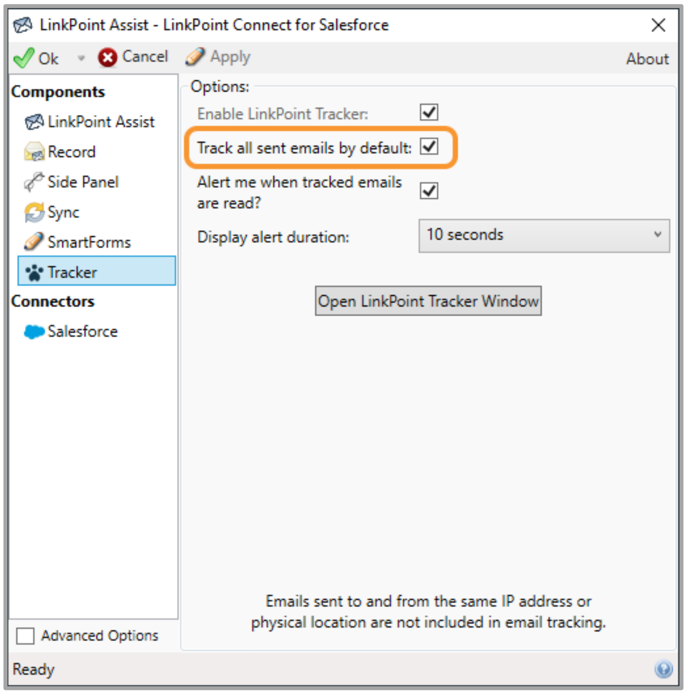
2 Select **Tracker** from the **Components** list on the left side of the **LinkPoint Assist** window and review the available options for LinkPoint Tracker.



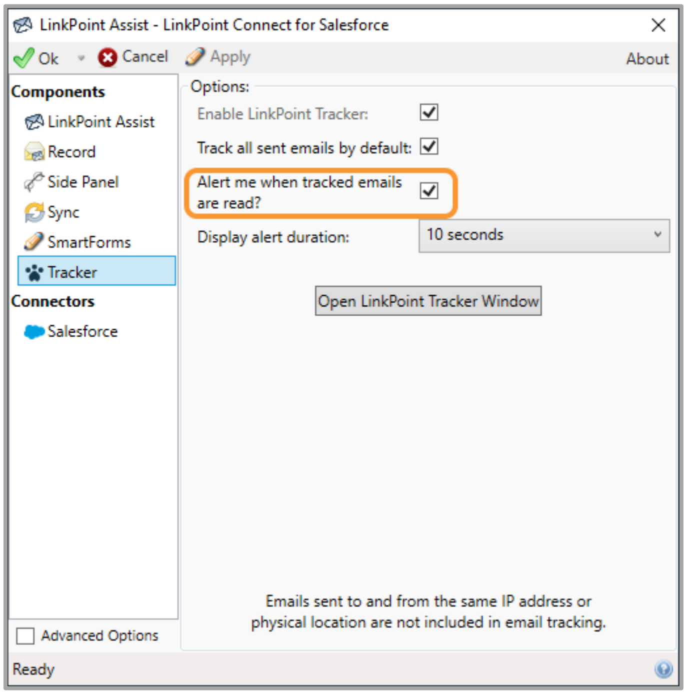
3 Select **Enable LinkPoint Tracker** to allow for emails to be tracked when sending outbound messages.



4 Select **Track all sent emails by default** to automatically track email opens.

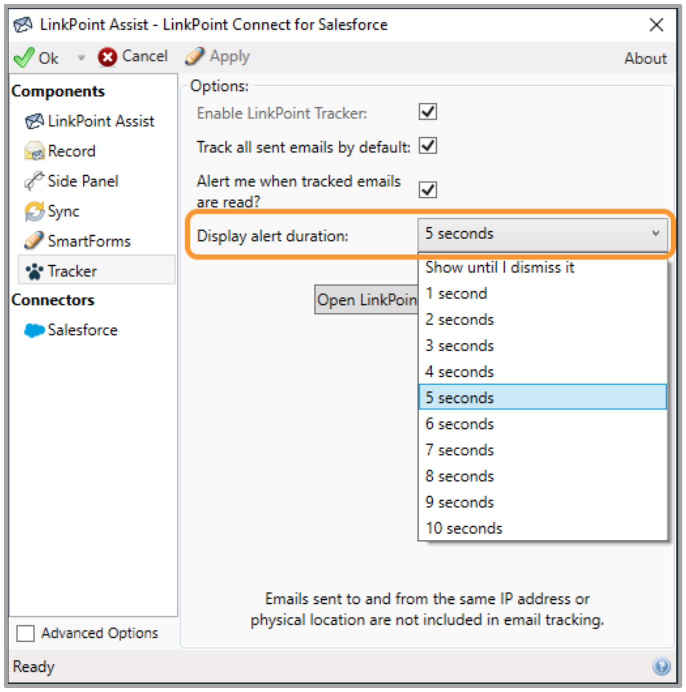


5 Select **Alert me when tracked emails are read?** to enable pop-up notifications to show email opens as they happen in real time.



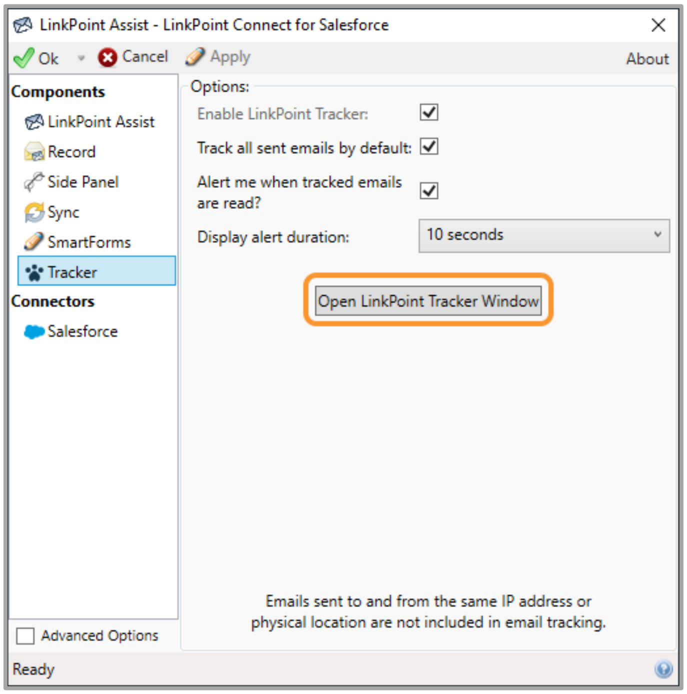
6

Select an option from the **Display alert duration** drop-down list to establish how long the pop-up notification should be displayed.



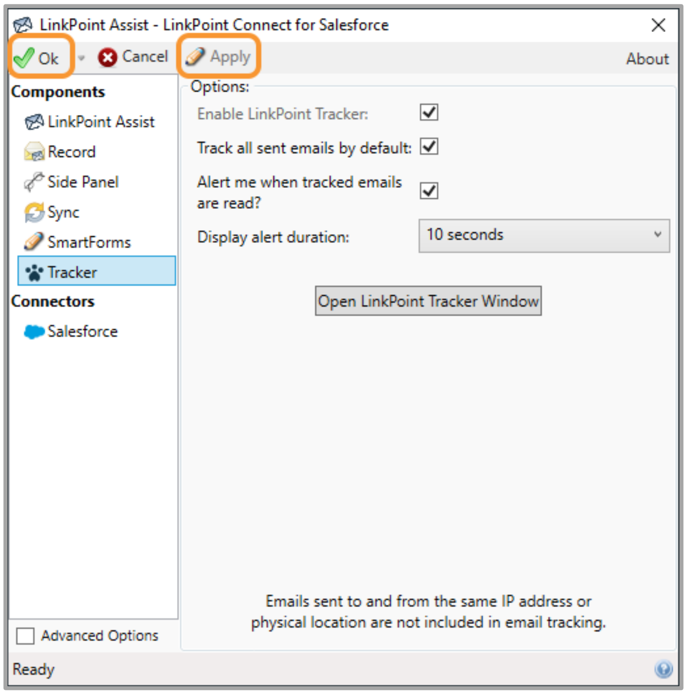
7

Select **Open LinkPoint Tracker** to launch the LinkPoint Tracker window.



8

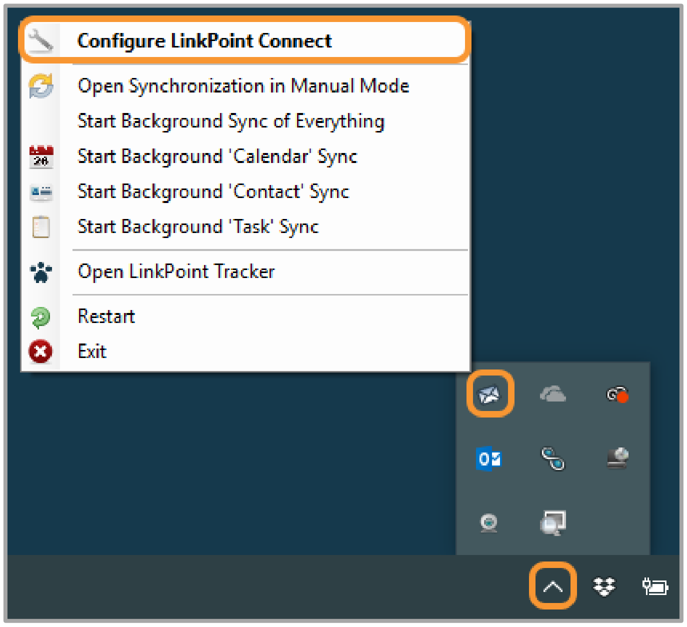
Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



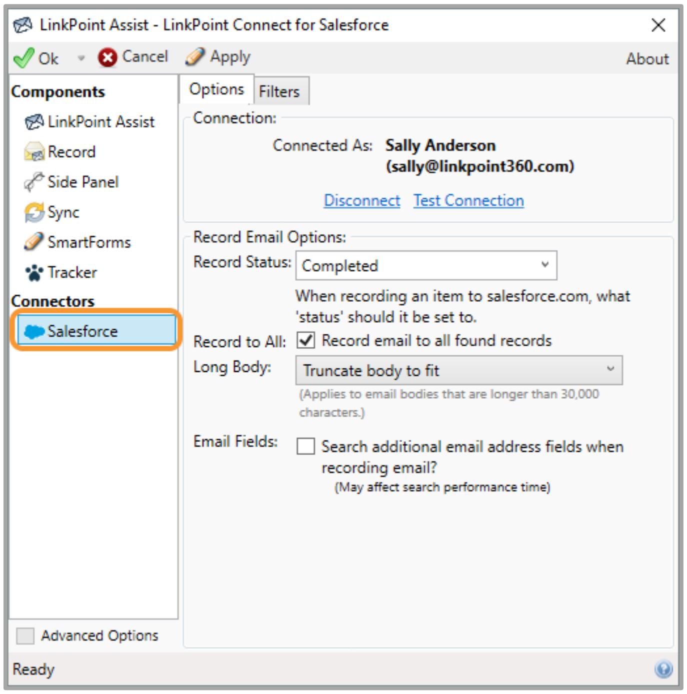
Configuring the LinkPoint Connect Salesforce Connector

LinkPoint Assist guides users through simple configuration processes to adapt LinkPoint Connect to individual and organizational needs. Various settings are available for managing the way that LinkPoint Connect displays Salesforce data, records emails, and syncs information between systems. In this section, you will learn how to configure Options and Filters for the Salesforce Connector in LinkPoint Assist.

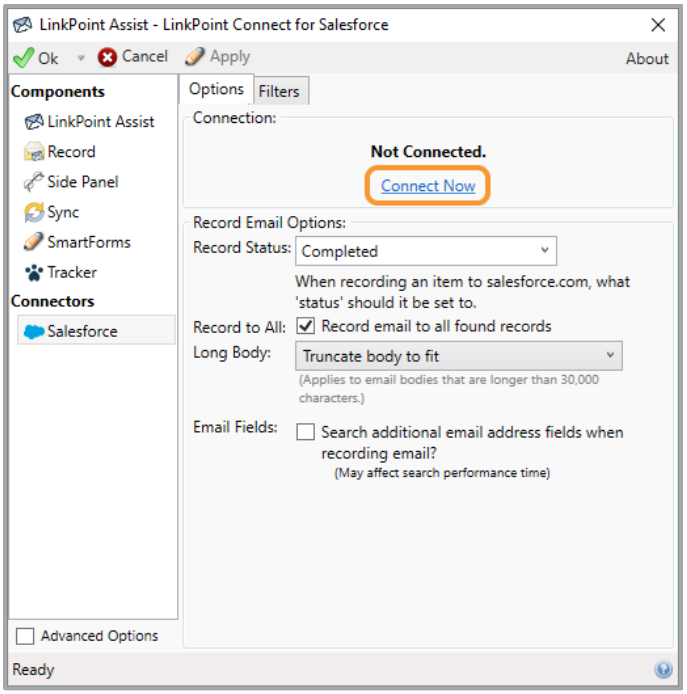
1. Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure LinkPoint Connect**.



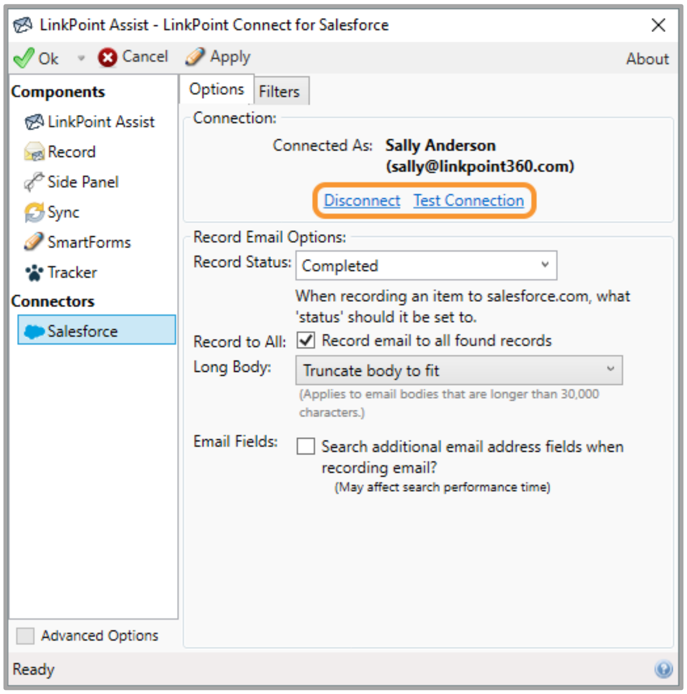
2 Select **Salesforce** from the **Components** list on the left side of the **LinkPoint Assist** window.



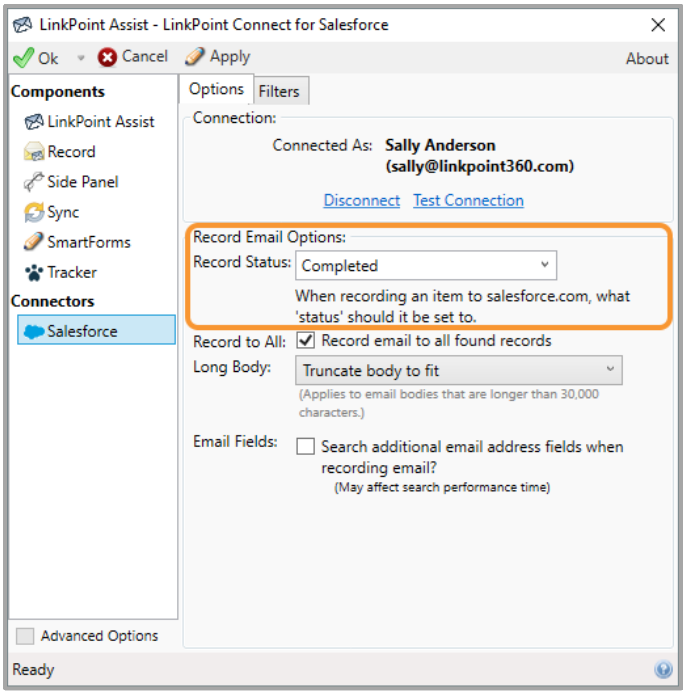
3 Select **Connect Now** to relate the Salesforce Account to LinkPoint Connect if not already connected.



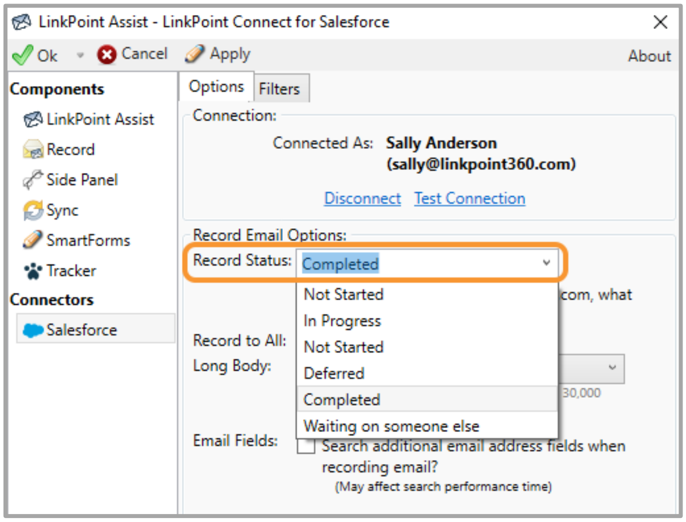
4 Select **Disconnect** to disassociate LinkPoint Connect. Select **Test Connection** to confirm that the Salesforce Account is correctly tied to LinkPoint Connect.



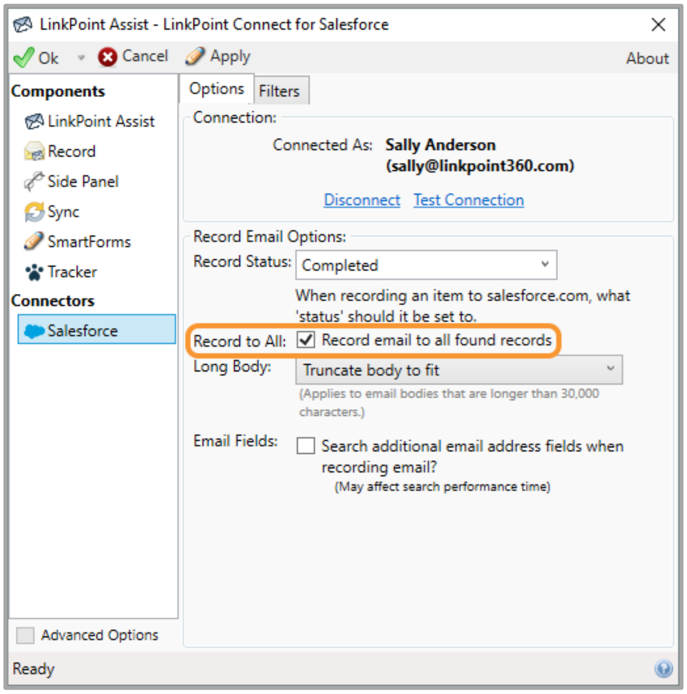
5 Select the **Record Status** from the drop-down list to determine the status of the item when it is entered in Salesforce on the Activity History.



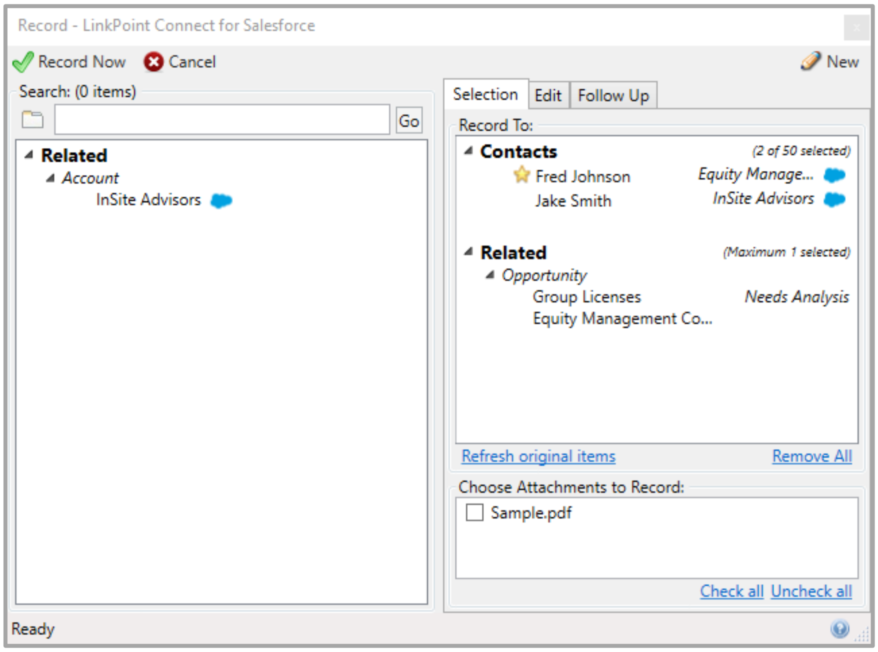
Tip: LinkPoint Connect will set the Record Status to **Completed** and offers a list of 6 default options which mirror Salesforce default statuses. The majority of LinkPoint Connect users leave the Record Status set to Completed so that it does not show as an open activity within Salesforce. If your organization uses custom statuses, you can click in the Record Status field and type the Salesforce Status how it appears in your system.



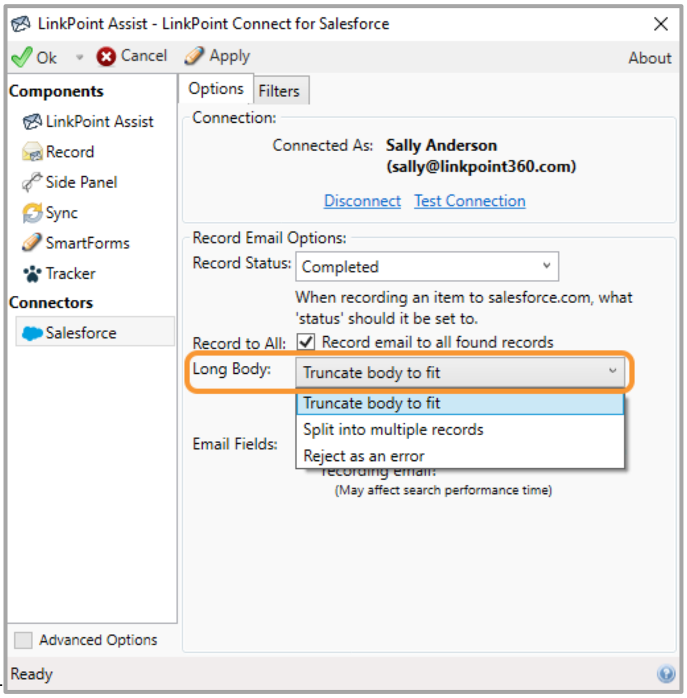
6 Select **Record to All** to cause LinkPoint Connect to recommend and add related Contacts to the Record To field in the Record window. This includes Contacts in the To:, Cc:, and Bcc: fields. This option is on by default.



Tip: With the Record to All option enabled, the Contacts related to the email being recorded are automatically entered into the Record To field. Users can remove any Contacts from the field before recording the email.

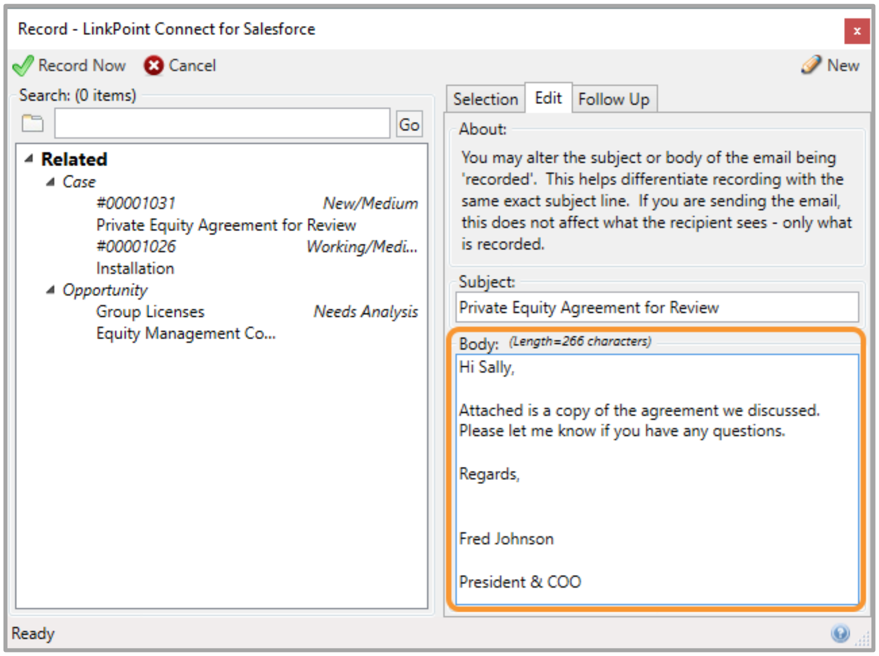


7 Select the **Long Body** drop-down list to review the options to handle emails with body content that exceeds the Salesforce limit of 32,000 characters.

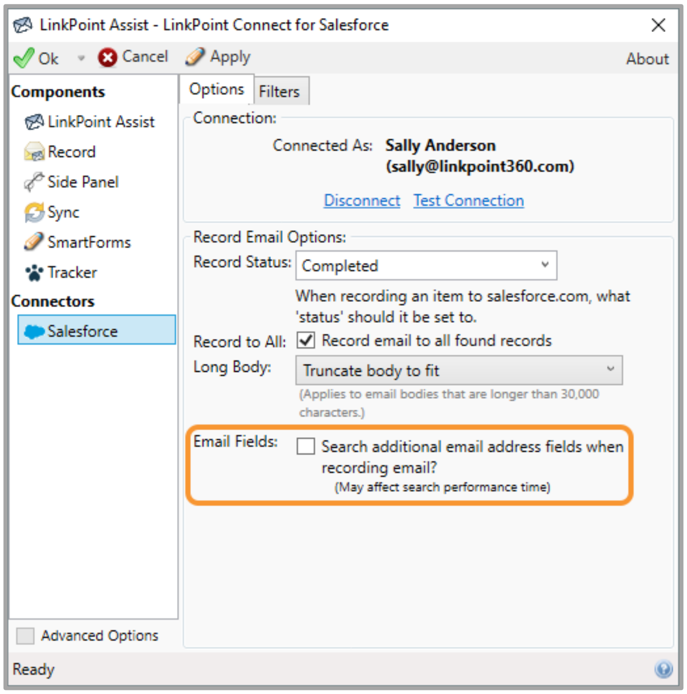


Tip: The **Truncate body to fit** option will only record the content up to the maximum character limit. Any content beyond the 32,000 characters will not be recorded. The **Split into multiple records** option will split the original email into multiple items in the Salesforce Activity History list when recording the email. Each instance will be identical except the body will include a portion of the original body. The **Reject as an error** option will not record any emails that have a body character count in excess of 32,000 characters.

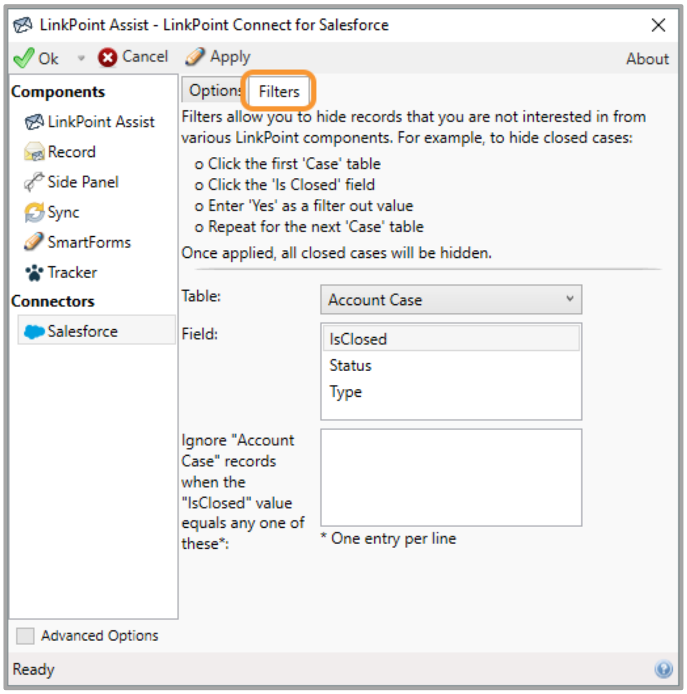
Warning: You can edit the content of longer emails to truncate the information yourself by selecting the Edit tab within the Record window and working with the content in the Body field. This field includes a character count for your reference.



8 Select the **Email Fields** checkbox to search for additional email address fields when recording emails.



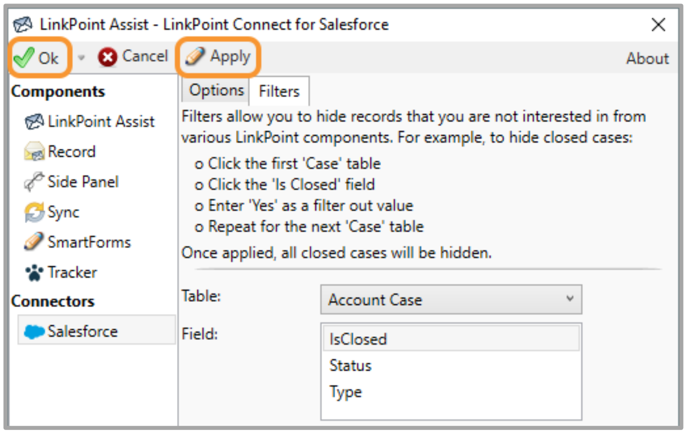
9 Select the **Filters** tab. Select the record type to work with, and then select the field associated with the record. Enter the values to determine the action applied to the selected items.



Tip: Users can set specific criteria to hide objects or fields from Salesforce and prevent them from being visible in the LinkPoint Connect. The items in the **Field** box change dynamically as different **Table** items are selected.

Example: Some organizations do not want to include closed cases as options for LinkPoint Connect users to record to. In this example, the user or admin would select **Account Case** or **Contact Case** as the **Table**. Then select **IsClosed** from the **Field** options. In the final entry box, enter **Yes**. This tells LinkPoint Connect to check for cases with a status of Closed and then not display them.

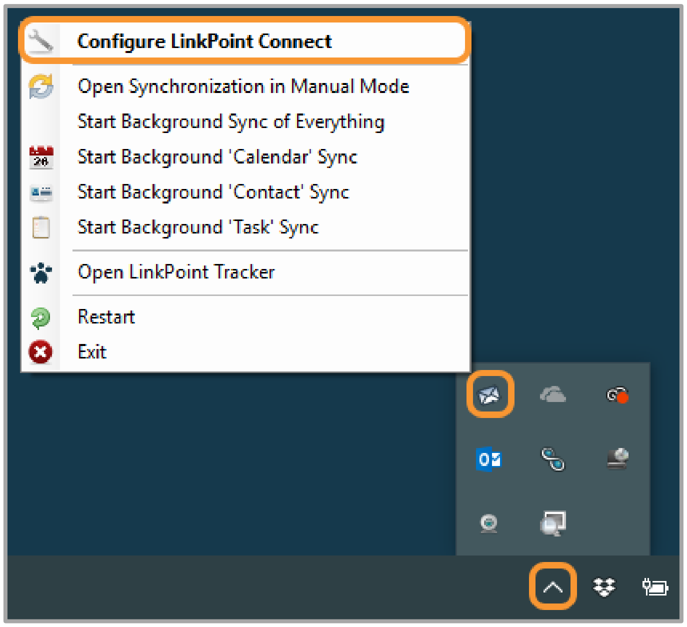
10 Click the **Apply** button when finished to finalize the settings. Click **Ok** to close LinkPoint Assist.



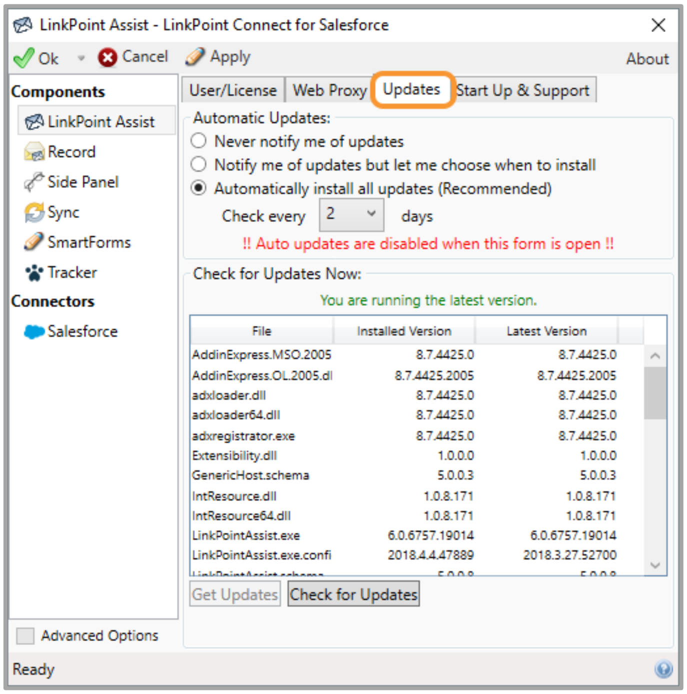
Manually Updating LinkPoint Connect

LinkPoint360 periodically releases new features and patches and provides users with access via updates. In this section, you will learn how to manually update LinkPoint Connect.

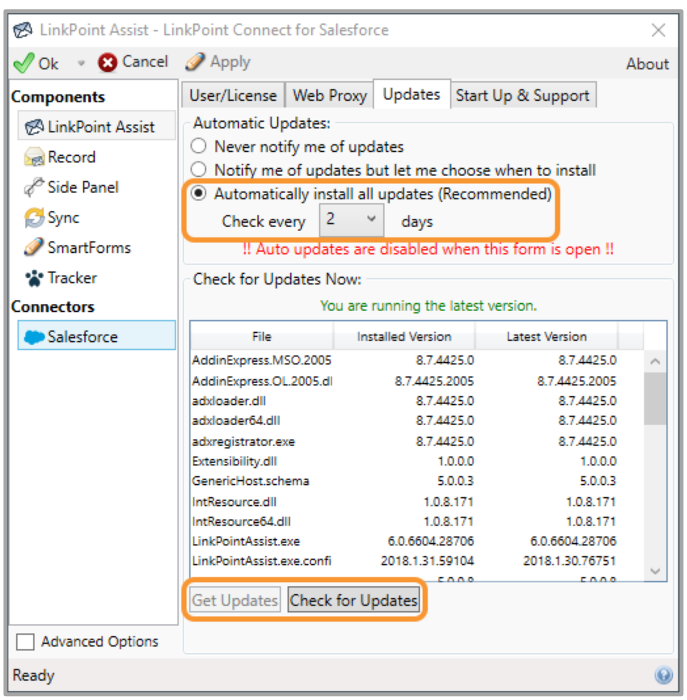
1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure LinkPoint Connect**.



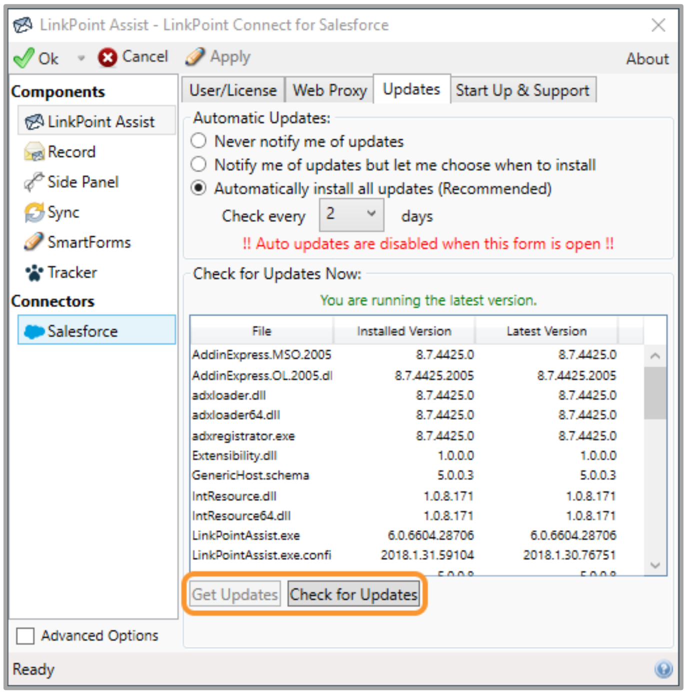
2 Select **LinkPoint Assist** from the **Components** list on the left side of the **LinkPoint Assist** window, and select the **Updates** tab.



Tip: LinkPoint Connect is set by default to **Automatically install all updates** and will check for updates every two days. If you change the Automatic Updates settings, you can use the **Check for Updates** and **Get Updates** buttons at the bottom of the LinkPoint Assist window.



3 Click the button to **Check for Updates**. Then, click the button to **Get Updates** if updates are available. Select **Yes** when prompted to restart LinkPoint Assist and then restart the email application.

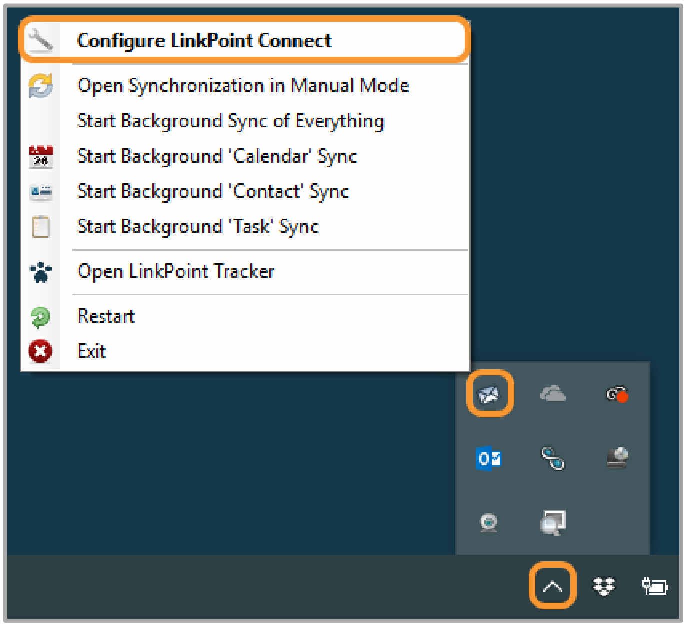


Warning: Most end users are able to access the Updates tab from the LinkPoint Assist window. In some instances, the Updates tab may be locked down or removed from LinkPoint Assist at the request of your internal IT team. If you do not see the Updates tab or do not have the ability to Get Updates, contact your internal IT admin for assistance.

Configuring LinkPoint Connect with a Salesforce Sandbox Account

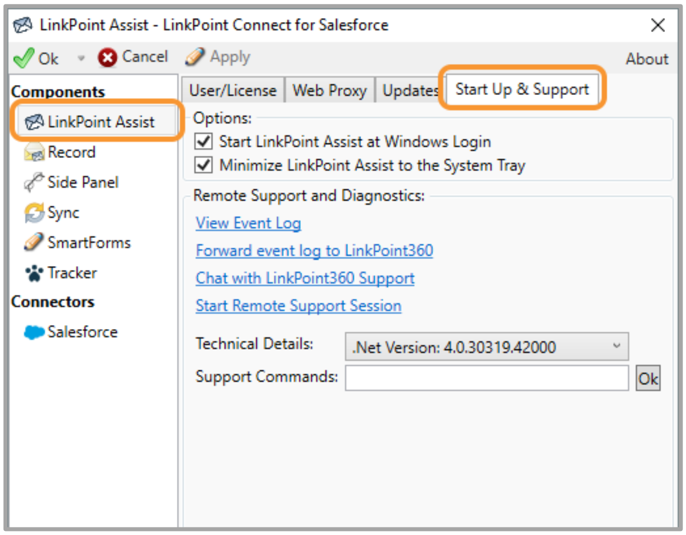
LinkPoint360 Professional Services Team will need access to a sandbox instance of customer Salesforce data in order to develop and test customized LinkPoint Connect application settings. This Salesforce sandbox instance must reflect the customer's production environment and should contain any custom objects that will be integrated with LinkPoint Connect. In this section, you will learn how to configure LinkPoint Connect with your Salesforce Sandbox account.

1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure LinkPoint Connect**.



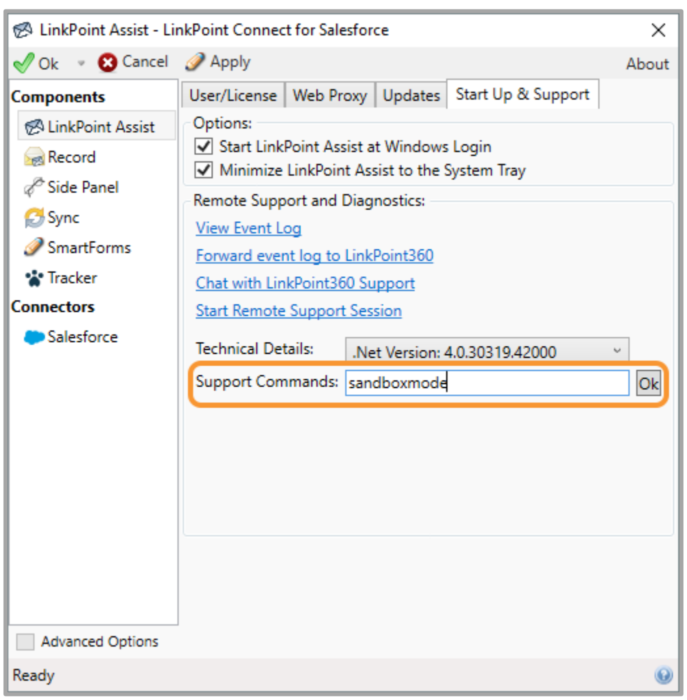
2

Select **LinkPoint Assist** from the **Components** list on the left side of the **LinkPoint Assist** window, and then select the **Start Up & Support** tab.

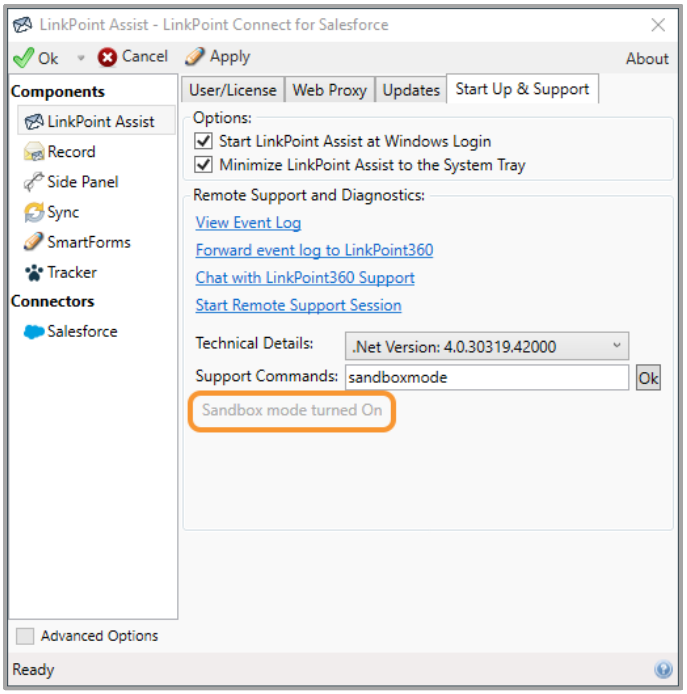


3

Enter *sandboxmode* in the **Support Commands** field and click the **Ok** button.

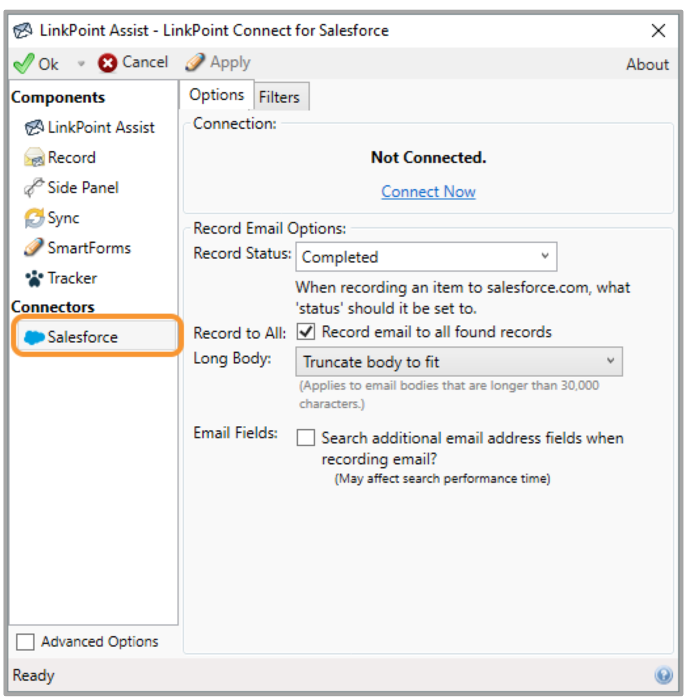


Tip: Note the message **Sandbox mode turned On** at the bottom of the Start Up & Support tab. To exit Sandbox Mode, enter *sandboxmode* in the Support Commands field and click **Ok**.



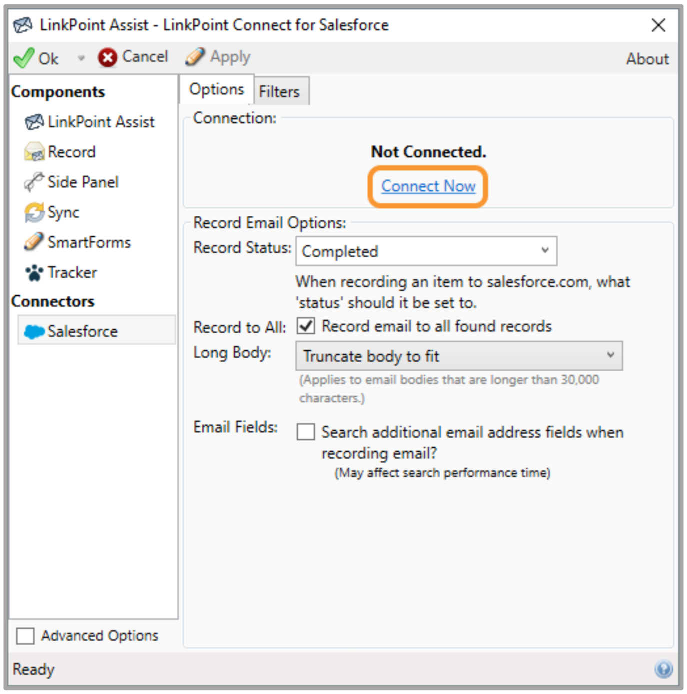
4

Select **Salesforce** from the **Components** list on the left side of the **LinkPoint Assist** window.

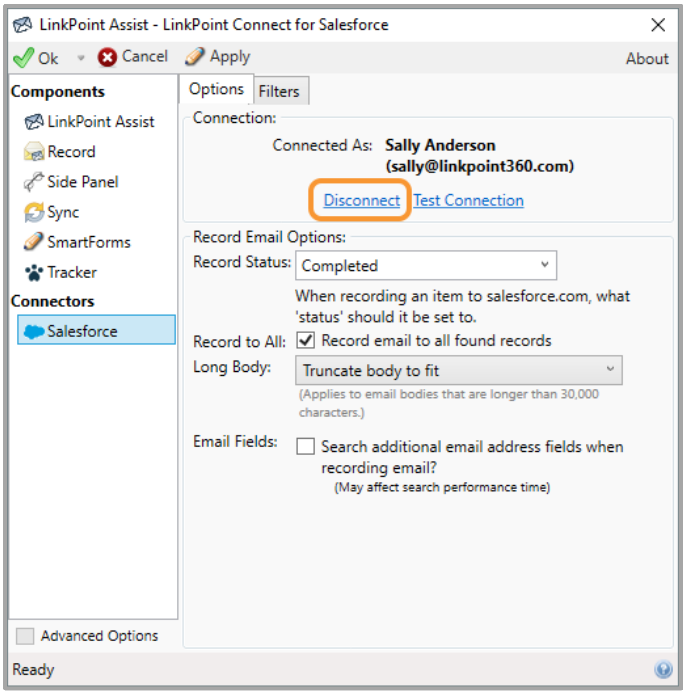


5

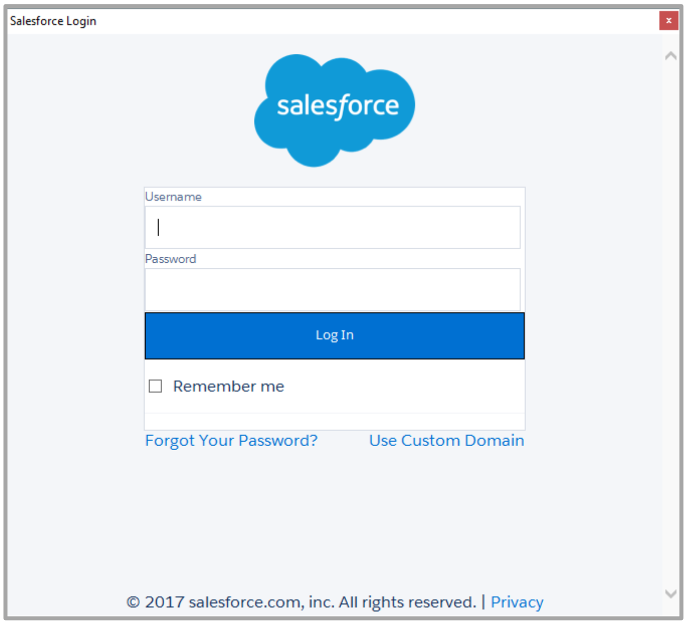
Select **Connect Now** to relate the Salesforce account to LinkPoint Connect if not already connected.



Tip: If you are already connected to Salesforce with a non-sandbox account, you will need to select **Disconnect** to proceed.

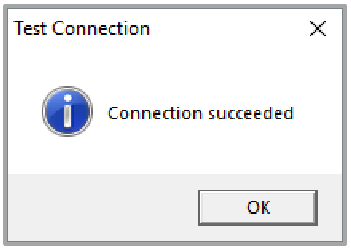


6 Enter your Salesforce Sandbox Account **User Name** and **Password**, and click the **Log in to Salesforce** button.



Tip: First-time users may need to click **Allow** to enable LinkPoint Connect to access your Salesforce account and display your Salesforce information in Microsoft Outlook.

7 LinkPoint Connect will test the connection to Salesforce. This may take a few moments. Click **OK** once the Test Connection window displays the Connection succeeded message.



Warning: When switching between Sandbox and Production modes, remember to rebuild history during next synchronization. Otherwise, you may delete your Calendar, Contact, and Task data.

Additional Resources: Customers must create new credentials for the LinkPoint360 Professional Services team to access the sandbox environment. These credentials must match the following standard exactly:

Username: proservice@linkpoint360.com.[YourCompanyName]
Email: proservice@linkpoint360.com

Configuring LinkPoint Connect for Salesforce Partner Communities

LinkPoint360 customers that use Salesforce Partner Communities can use LinkPoint Connect throughout their organization and their partner network. LinkPoint Connect is configurable for integration with Partner Communities and can be accessed by partners with their individual credentials. Partners can then record email communication that they have with prospects directly to Salesforce without the need to log into the Partner Communities directly. In this section, you will learn how to configure LinkPoint Connect with a Salesforce Partner Community.

1

Get the **Community URL**. When a Partner Community is created, a unique domain for the community is generated. For example, if the company domain is LinkPoint360.force.com and a customer community was created, the Community URL will look similar to: *linkpoint360.force.com/customers*

2

Find the **OAuthBaseURL**.

1. Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure**.
2. Select **LinkPoint Assist** from the **Components** list on the left side of the **LinkPoint Assist** window, and then select the **Start Up & Support** tab.
3. Enter *open ini* in the **Support Commands** field and click the **Ok** button.
4. Locate the OAuthBaseURL setting under the [Salesforce] heading in the text document. The OAuthBaseURL will look similar to: *OAuthBaseURL=https://login.salesforce.com/services/oauth2*

3

Update the **OAuthBaseURL**. Update the login.salesforce.com portion of the OAuthBaseURL with the custom domain. For example, if the Partner Community domain is LinkPoint360.force.com/customers, then the updated setting will look similar to: *OAuthBaseURL=https://LinkPoint360.force.com/customers/services/oauth2*. Save and close the text document after making the changes. Then connect LinkPoint Connect to Salesforce.

Tip: If you notice that the LinkPoint Connect Side Panel is not displaying records correctly, you may need to add an additional setting to the LinkPoint Connect configuration.

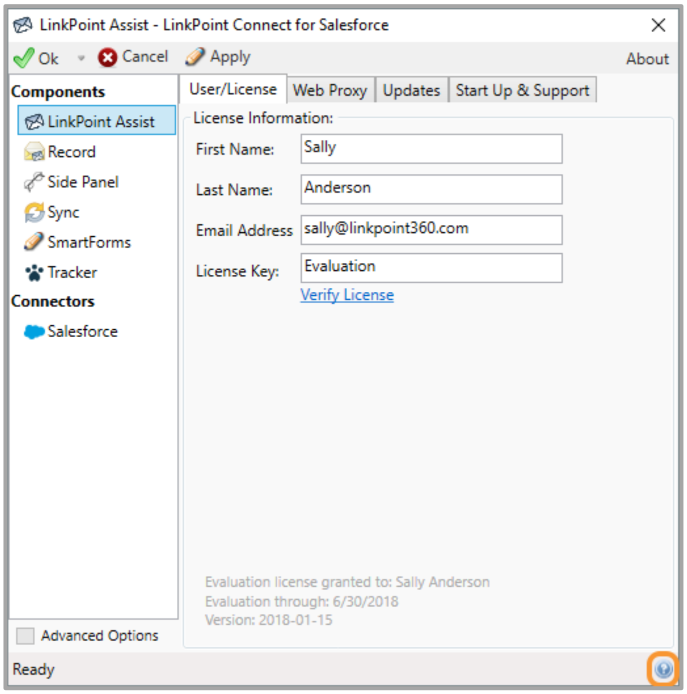
1. Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure**.
2. Select **LinkPoint Assist** from the **Components** list on the left side of the **LinkPoint Assist** window, and then select the **Start Up & Support** tab.
3. Enter *open ini* in the **Support Commands** field and click the **Ok** button.
4. Enter *SalesforceRuntimeServerURL=* with your partner community URL after the equal sign under the [Salesforce] heading in the text document. The string will look similar to: *SalesforceRuntimeServerURL=https://LinkPoint360.force.com/customers*
5. **Save** and close the text document.
6. Right click the **LinkPoint Assist** icon in the system tray and select **Restart**.

Additional Features

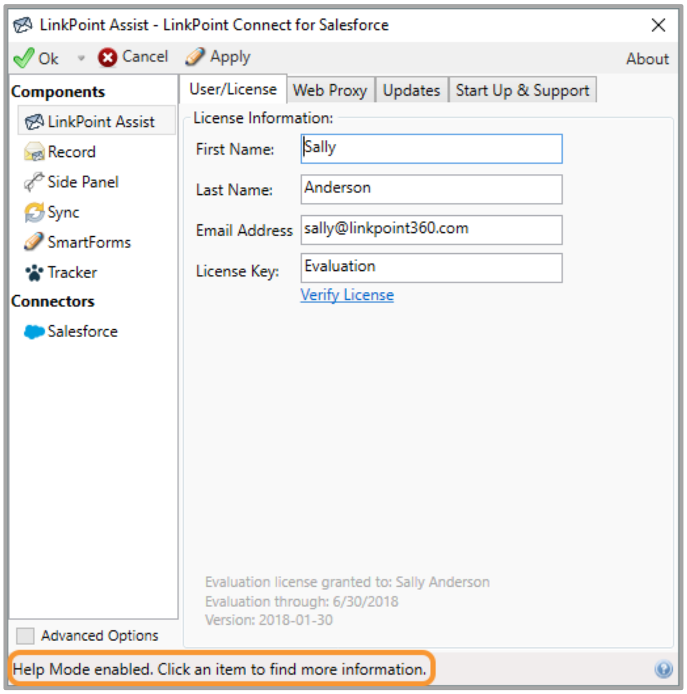
Finding Knowledge Base Articles within LinkPoint Connect

LinkPoint360 offers comprehensive knowledge base articles and help documentation online at www.linkpoint360.com/kb. As users view Side Panel details, record emails, or change settings in LinkPoint Assist, they can click the help icon to navigate directly to knowledge base articles. In this section, you will learn how to access LinkPoint Connect Contextual Help Content.

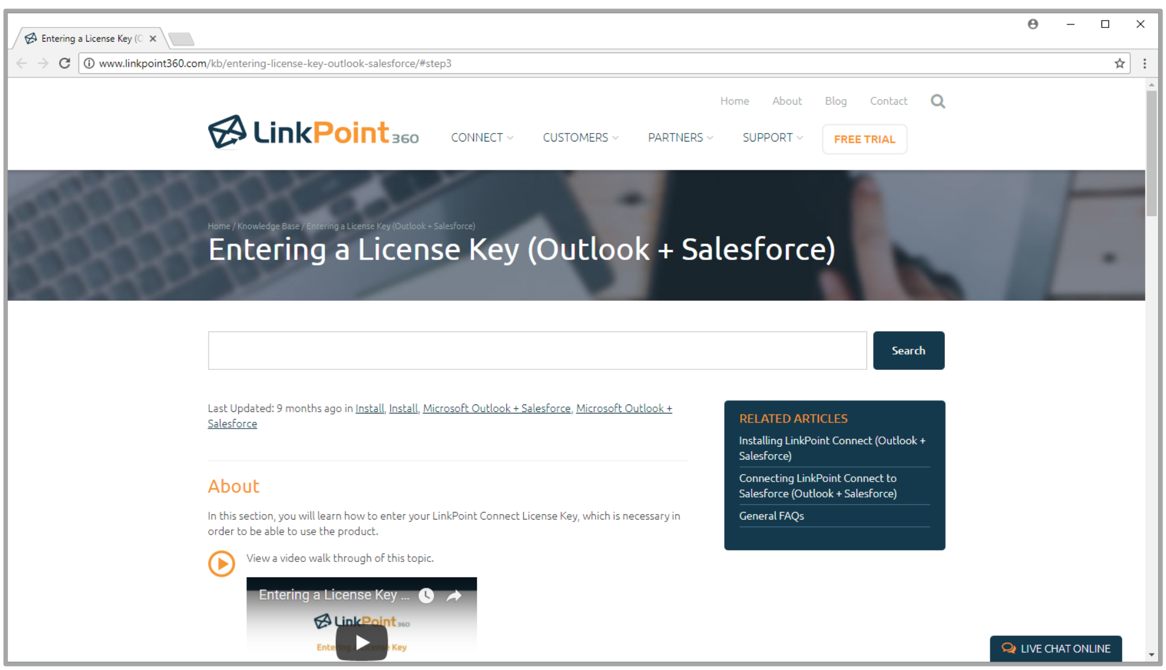
1. Open any LinkPoint Connect screen, such as the LinkPoint Connect Side Panel, Record window, Regarding window, or LinkPoint Assist. Click the **Help Mode** icon in the bottom right corner of the window.



2 Click a field or field label inside the window for more information. Note that the bottom of the window indicates that the window has **Help Mode enabled**.



3 Review the related help information in the LinkPoint360 Knowledge Base which will launch in your web browser.



Viewing LinkPoint Connect Usage Reports in Salesforce

Companies that roll out LinkPoint Connect across their organization realize increased CRM adoption and overall productivity gains. LinkPoint Connect offers customers even greater CRM adoption by providing the ability for managers and admins to track LinkPoint Connect usage. By being able to see which LinkPoint Connect users are leveraging the tool properly, additional measures can be taken to educate and increase user adoption. In this section, you will learn how to implement LinkPoint Connect Usage Reports.

Warning: The following steps can only be followed by Salesforce users with Admin privileges to create and alter fields within Salesforce and across and organization. Contact your admin for more information.

1. Create a new Date\Time type field named **LinkPointTouchDate__c** within Salesforce. Add this field to Contact, Task, and Event objects.
2. Add the LinkPointTouchDate__c field for all users within the organization for which the usage report will be run. If the field and objects are not applied to the correct users with the correct access, the data will not be collected.
3. LinkPoint Connect will automatically update this field per user within Salesforce with unique usage data every time the user syncs or records information. This will show the last time LinkPoint Connect was used on an individual level.
4. Create a report within Salesforce that includes the LinkPointTouchDate__c field across the users to be monitored. This will demonstrate usage across teams within the organization

Tip: You do not need to expose the LinkPointTouchDate__c field to end users in order to collect data or run reports. This will prevent data from being overwritten. The field is automatically exposed to the LinkPoint Connect API.