

LinkPoint Connect User Guide

Desktop Edition

Enhanced Side Panel Release



Table of Contents

OVERVIEW	4
<i>About LinkPoint Connect.....</i>	<i>4</i>
<i>A Note about Upgrades.....</i>	<i>4</i>
<i>A Note about Configuration.....</i>	<i>4</i>
SET UP	5
<i>Install LinkPoint Connect</i>	<i>5</i>
<i>Configure LinkPoint Connect.....</i>	<i>8</i>
RECORD EMAILS	12
<i>Record an Email to Salesforce</i>	<i>12</i>
<i>Record an Attachment to Salesforce.....</i>	<i>16</i>
<i>Create a Follow Up in Salesforce.....</i>	<i>18</i>
TRACK EMAILS	20
<i>Track Email Opens.....</i>	<i>20</i>
<i>Configure LinkPoint Tracker</i>	<i>24</i>
VIEW DATA	27
<i>Display the Side Panel.....</i>	<i>27</i>
<i>View Salesforce Data in Outlook.....</i>	<i>29</i>
<i>Configure Display and Search Settings.....</i>	<i>32</i>
CREATE AND EDIT RECORDS.....	37
<i>Drag and Drop to Create Salesforce Records</i>	<i>37</i>
<i>Drag and Drop to Update Salesforce Records</i>	<i>39</i>
<i>Create Salesforce Records with SnapForms</i>	<i>42</i>
<i>Edit Salesforce Records with SnapForms</i>	<i>44</i>
<i>Work with Short Forms.....</i>	<i>45</i>
SYNC CALENDAR EVENTS.....	50
<i>Choose a Calendar Sync Mode.....</i>	<i>50</i>
<i>Record Events with SnapRecord.....</i>	<i>51</i>
<i>Establish Calendar Auto Sync Settings</i>	<i>55</i>
<i>Relate Calendar Events to Salesforce with Auto Sync</i>	<i>61</i>

SYNC CONTACTS.....	64
<i>Choose a Contact Sync Mode.....</i>	<i>64</i>
<i>Establish Contact Auto Sync Settings.....</i>	<i>65</i>
<i>Sync Contacts with Different Filters.....</i>	<i>70</i>
SYNC TASKS.....	73
<i>Choose a Task Sync Mode.....</i>	<i>73</i>
<i>Record Tasks with SnapRecord.....</i>	<i>74</i>
<i>Establish Task Auto Sync Settings.....</i>	<i>77</i>
<i>Relate Tasks to Salesforce with Auto Sync</i>	<i>83</i>
SET SYNC OPTIONS.....	86
<i>Configure and Run a Manual Sync</i>	<i>86</i>
<i>Rebuild Sync History.....</i>	<i>92</i>
CONFIGURE LINKPOINT CONNECT	95
<i>Edit Preferences.....</i>	<i>95</i>
<i>Configure Web Proxy.....</i>	<i>98</i>
<i>Configure Updates.....</i>	<i>101</i>
<i>Activate Sandbox Mode</i>	<i>103</i>
<i>Configure a Salesforce Partner Community Account.....</i>	<i>105</i>
<i>Create LinkPoint Connect Usage Reports in Salesforce.....</i>	<i>106</i>

Overview

About LinkPoint Connect

LinkPoint Connect streamlines data entry and access to Salesforce by enabling users to instantly view data in Outlook. Users can record inbound and outbound emails to Salesforce with just a few clicks. Users can also create new accounts, contacts, and leads from an email signature with drag and drop functionality. SnapForms provide access to create or update Salesforce records based on the user's Salesforce permissions and setup. LinkPoint Connect includes options for one-click, auto, and manual sync for calendar events, contacts, and tasks. Robust configuration options let users control how data is recorded, viewed, updated, and synced.

A Note about Upgrades

Products and services provided by LinkPoint360 are automatically updated by default. Individual users may, in most cases, change update preferences in LinkPoint Assist. Some organizations may request that upgrades be disabled by default and then manually released at the discretion of internal IT teams. If new features or functionality are listed but do not appear in a customer's instance of LinkPoint Connect, please contact an internal IT team member or Salesforce admin for more information.

A Note about Configuration

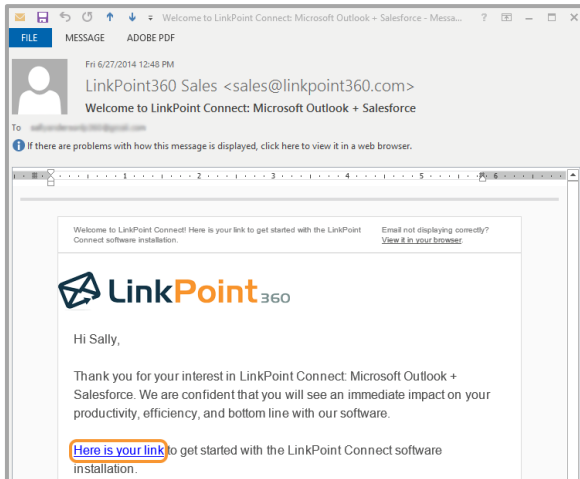
Depending on how an organization has configured LinkPoint Connect to mirror existing business processes, users may not have all of the options described throughout this user guide. By default, each user will have access to the objects, records, and fields that they have access to in Salesforce. Users can configure view, create, update, and sync settings to change how the Side Panel and related windows operate in Outlook. Customers can also request configuration changes through LinkPoint360 Professional Services, which may alter the available options. Please contact an internal IT team member or Salesforce admin for more information.

Set Up

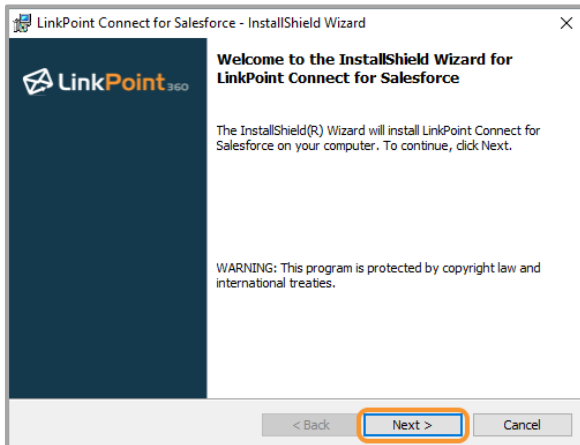
Install LinkPoint Connect

LinkPoint Connect is a PC-installed application that allows users to work with and create Salesforce data directly in desktop instances of 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.

- 1 Select the link for the LinkPoint Connect Installer provided in the welcome email or enter the URL provided by LinkPoint360 in the browser address bar, and press **Enter**.

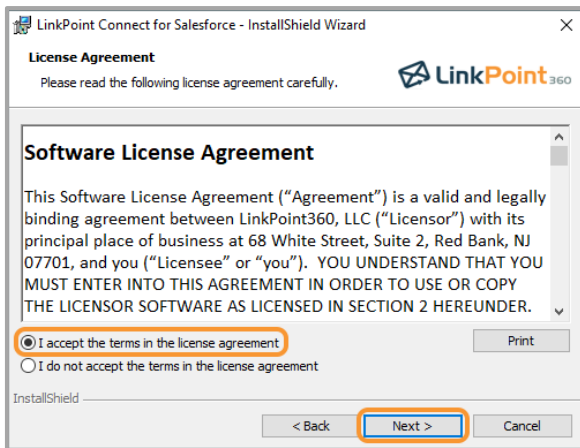


- 2 Save the file named **LinkPointConnectSF.exe** to the computer, and open it to launch the Installer.
- 3 Click **Next** in the **LinkPoint Connect for Salesforce – InstallShield Wizard** to start the installation process.



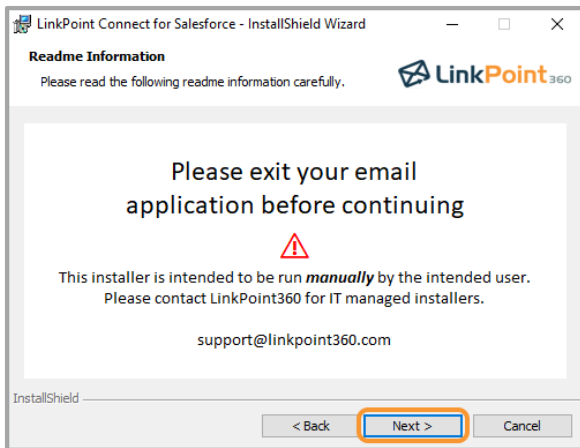
4

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



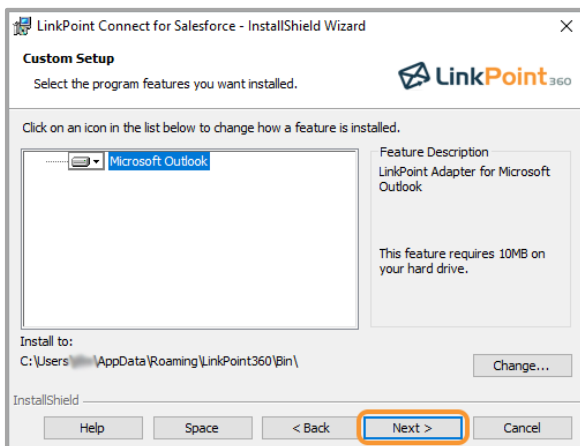
5

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



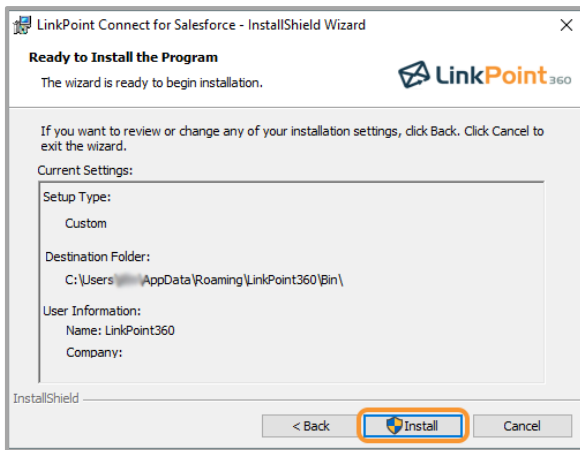
6

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



7

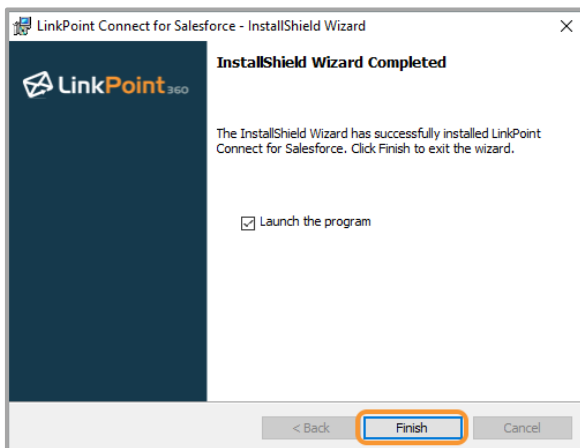
Review the **Current Settings**. Click **Back** to make changes, or click **Install** to start the installation.



Tip: LinkPoint Connect relies on a common Microsoft technology called **.NET Framework 4.52 Client Profile** which comes pre-loaded on Windows 7 and above. If the computer does not already have this installed, it will automatically be downloaded as part of the LinkPoint Connect installation process.

8

Select the **Launch the program** checkbox, and click the **Finish** button to exit the Installer.

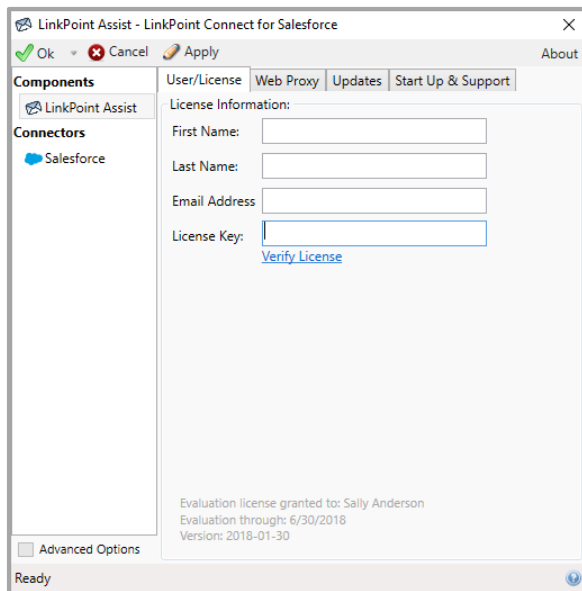


Configure LinkPoint Connect

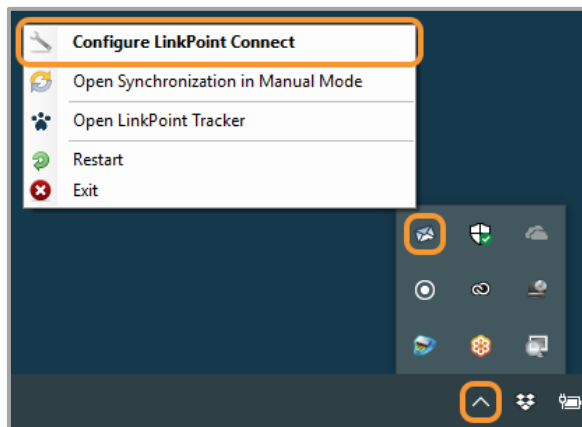
LinkPoint Connect is a PC-installed application that allows users to work with and create Salesforce data directly in desktop instances of Outlook. To use LinkPoint Connect beyond the initial free trial period, users must enter a unique License Key. All instances of LinkPoint Connect require the user to connect to a Salesforce account.

1

Launch the **LinkPoint Assist** window.

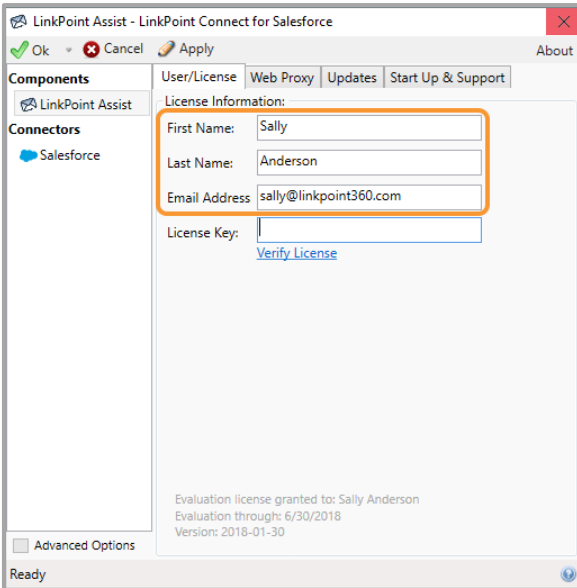


Tip: Users may automatically arrive in LinkPoint Assist by selecting the option to **Launch the program** when finishing the Installer. Users can also access these settings by clicking the **LinkPoint Assist** icon in the system tray with the right mouse button and then selecting **Configure LinkPoint Connect**.



2

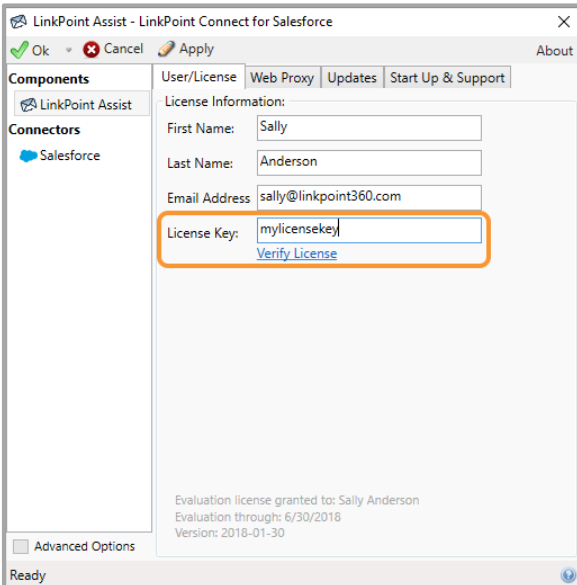
Enter the required information for the **First Name**, **Last Name**, and **Email Address** fields.



Tip: The license information entered should match the user's login information for Salesforce. If different information is entered, the fields will be overwritten and locked once the user connects to Salesforce.

3

Enter the **License Key** provided in the welcome email or by LinkPoint360 staff, and click **Verify License**.



Tip: In some cases, the License Key may be prepopulated based on the company's configuration. If users are installing LinkPoint Connect as part of the free trial, the License Key will be **Evaluation**.



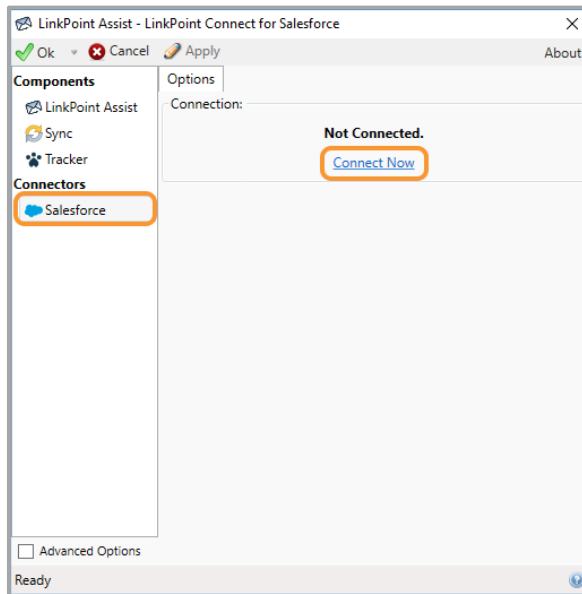
Warning: Customers will need to follow the steps to update the License Key from *Evaluation* to the unique License Key provided after purchase.



Tip: If the License Key reverts back to *Evaluation*, a firewall may be blocking access to the LinkPoint Connect server or there may be an issue with the proxy settings. Please contact an internal IT team member for assistance.

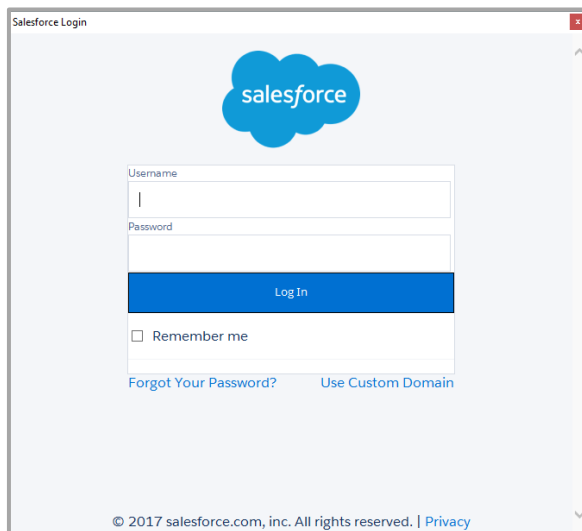
4

Select **Salesforce** from the **Connectors** list in the **LinkPoint Assist** window, and select **Connect Now**.



5

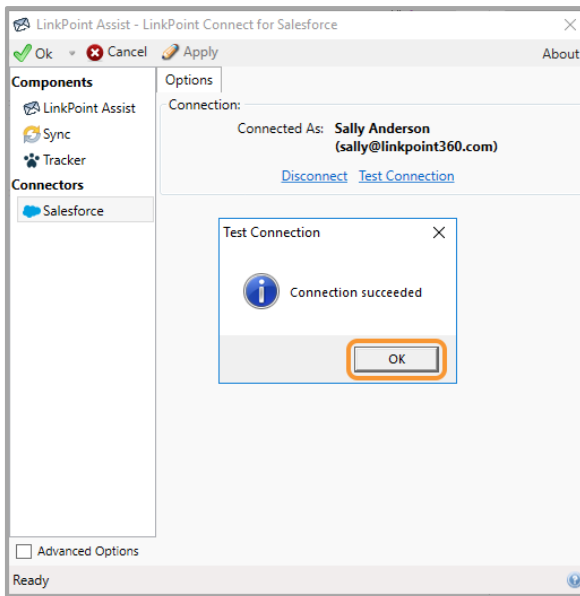
Enter the user's Salesforce **Username** and **Password**, and click the **Log In** button.



Tip: First-time users may need to click **Allow** to enable LinkPoint Connect to access the Salesforce account.

6

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.



Record Emails

Record an Email to Salesforce

Record emails to Salesforce directly from the Side Panel in Outlook. The process is the same for inbound and outbound emails.



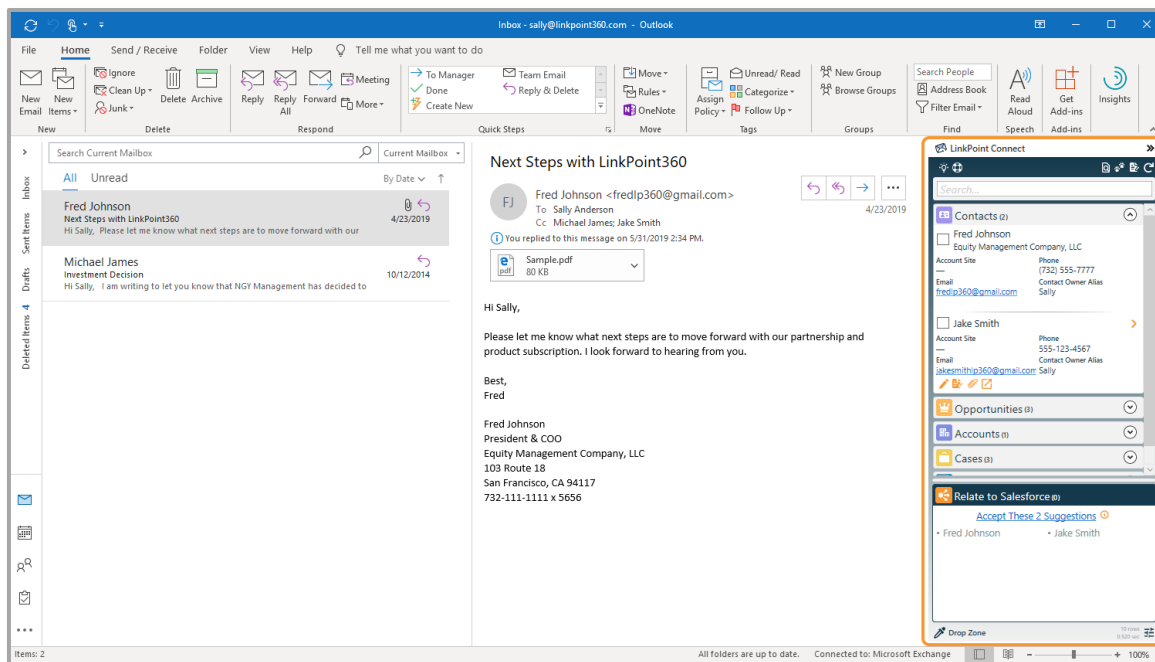
Additional Resources: Users can adjust the display and search settings in the Side Panel. Refer to the [Edit Preferences](#) section of this User Guide for more information.



Warning: Large emails with more than 32,000 characters in the body will record to Salesforce. However, the additional text will not be recorded because Salesforce limits the “Comments” field for tasks to 32,000 characters.

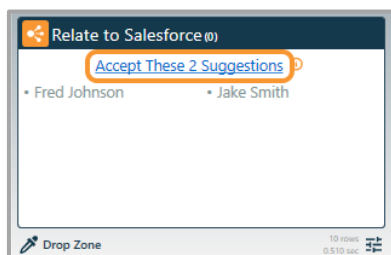
1

Select or compose an email. Note that the Side Panel returns Search Results based on the sender and/or recipient email address(es) and the related Salesforce records.



2

Select the option to **Accept This/These Suggestions** in the **Relate to Salesforce** section to record the email to all of the listed suggested records.

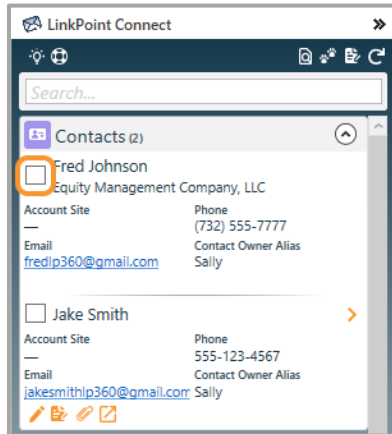




Tip: LinkPoint Connect automatically suggests contacts and/or leads in Salesforce if they are included in the To, From, Cc, or Bcc fields of the email. If there are no matching contacts or leads in Salesforce, the Relate to Salesforce section will not display any suggestions.

3

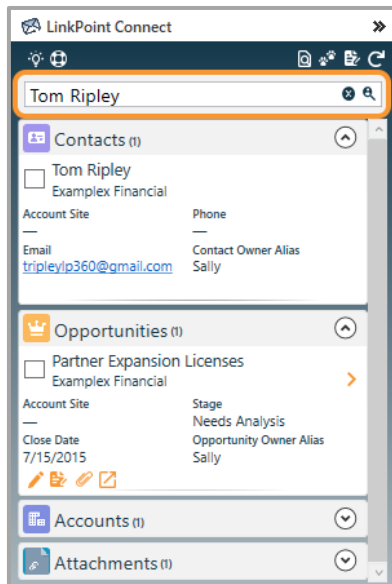
Select the **Relate to Salesforce** checkbox next to records in the Search Results to record the email to the selected record.



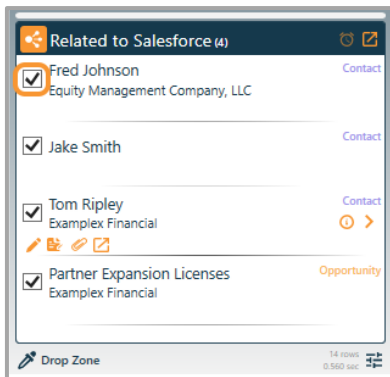
Warning: Salesforce does not allow users to take action on contacts and leads at the same time. Try selecting only contacts or only leads and record the email.

4

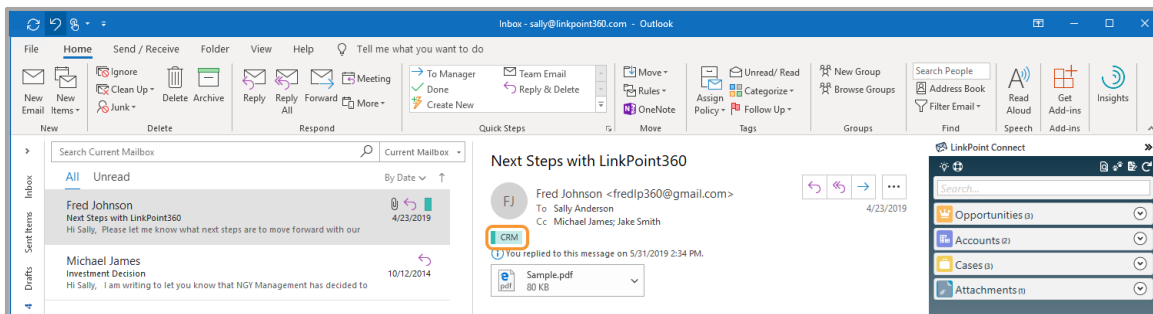
Enter text in the **Search** field, and press **Enter** or click the Search icon to search for additional records.



- 5 Deselect the **Relate to Salesforce** checkbox to disassociate the email from a selected record. Unchecking all of the selections will remove the email from Salesforce.



Tip: An Outlook Category of **CRM** will be assigned automatically to the email after it has been recorded to Salesforce, providing a visual indicator of recorded emails in Outlook.



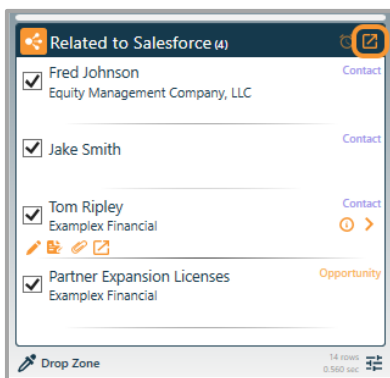
Tip: Some SnapShots in the Side Panel may not include a checkbox to relate the item to a Salesforce record. The option to Relate to Salesforce only appears when working with a supported Outlook item (i.e. email, calendar event, or task). The checkbox will not appear if the record does not include Activity History in Salesforce.



Additional Resources: SnapShots provide an overview of Salesforce records in the Side Panel. Refer to the [View Salesforce Data in Outlook](#) section of this User Guide for more information.

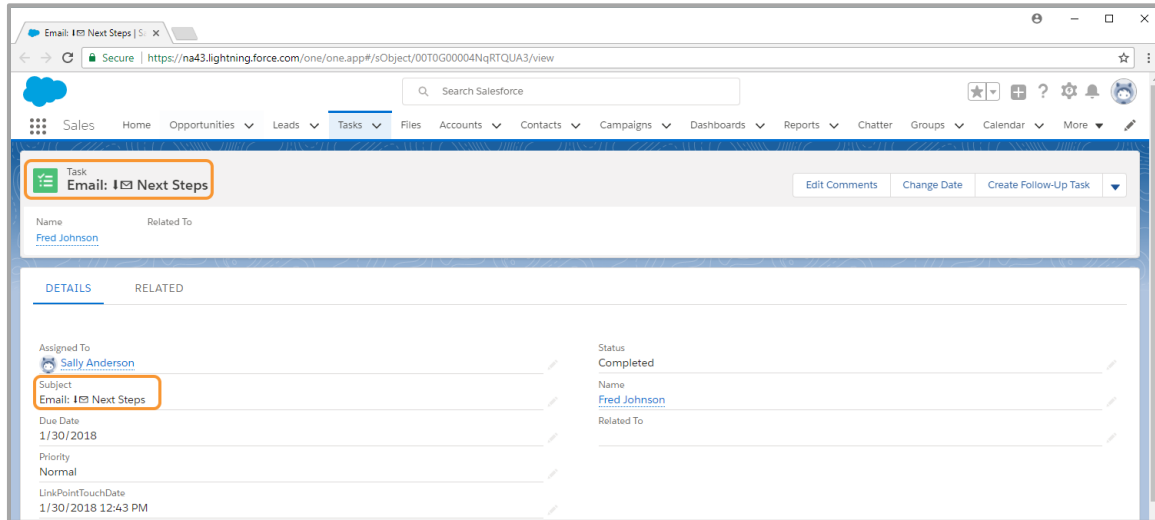


Tip: To view the recorded email, click the **Open Record** icon in the Related to Salesforce header. This will open the email as a completed task in Salesforce in a web browser.





Tip: Recorded emails will include an indicator icon in the Subject Line in the Activity History in Salesforce. The ↓✉ (inbound) and ✉↑ (outbound) indicators are automatically applied as part of the recording process and show whether an item was sent or received.



6

Send the email to record it to the selected Salesforce records. Inbound emails will be recorded in real time when Relate to Salesforce selections are made.

Record an Attachment to Salesforce

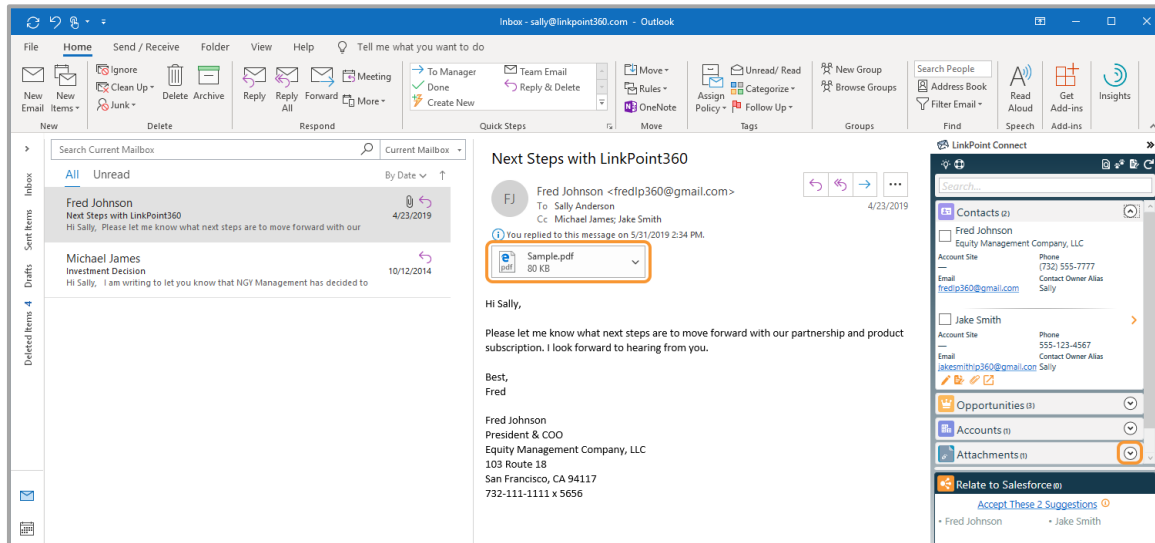
Record attachments on inbound or outbound emails to Salesforce using the Side Panel. Attachments are saved to either the Notes & Attachments or Files object in Salesforce as a single item and related to multiple records, depending on the user's Salesforce configuration.



Additional Resources: Users can preconfigure default behavior for recording Attachments in the Preferences Pane. Refer to the [Edit Preferences](#) section of this User Guide for more information.

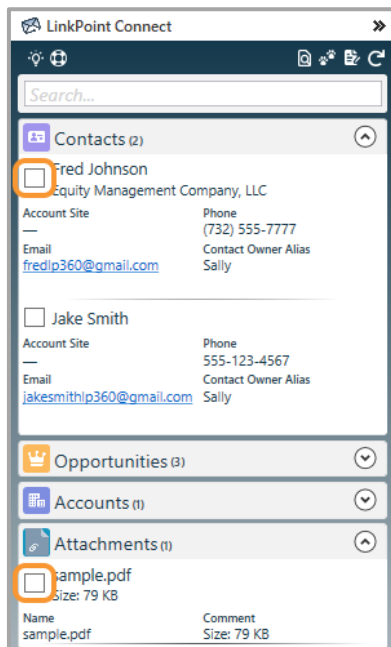
1

Select or compose an email containing at least one attachment. Note that the Side Panel includes **Attachments** in the Search Results. Click the **Expand** icon to view the list of attachments on the email.



2

Select the record(s) to relate the email to in Salesforce. Then click the Attachments checkbox for the attachment.

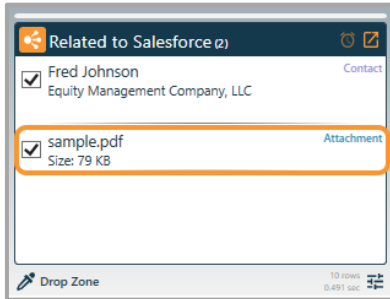




Tip: Users must select at least one record to relate the email to in Salesforce before the attachment can be recorded.

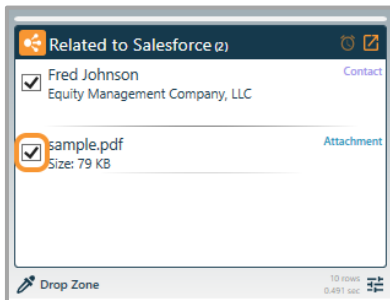
3

Note that the attachment is listed in the **Related to Salesforce** section. The file will be uploaded to Salesforce and related to all of the listed records when the email is recorded. Attachments on inbound emails are recorded in real time when Relate to Salesforce selections are made. Attachments on outbound emails are recorded when the email is sent.

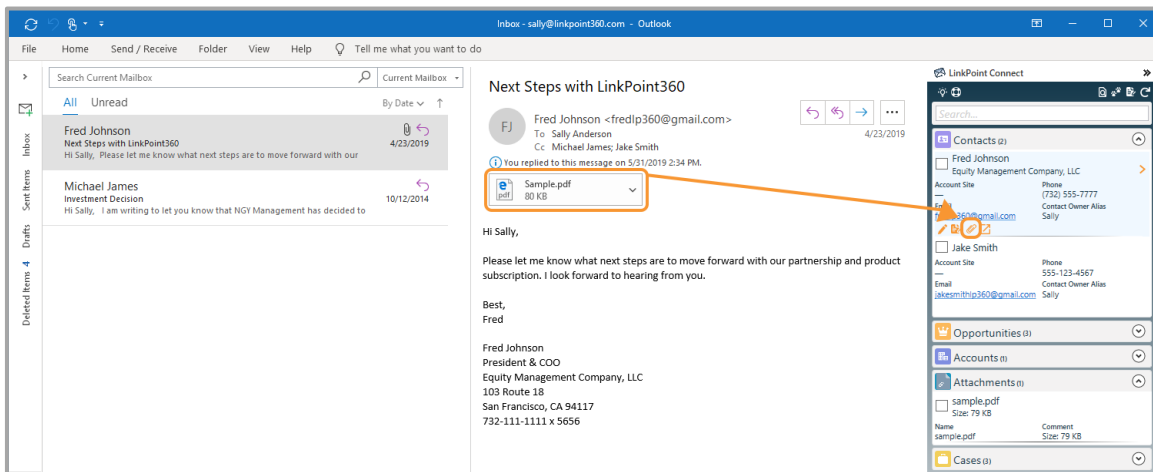


4

Deselect the **Related to Salesforce** checkbox to remove the attachment from Salesforce.



Tip: Users can record files from anywhere on the desktop to a single Salesforce record. Click on the file and hold the left mouse button down. Drag the item to any paperclip icon in the Side Panel and release the left mouse button. The attachment will be recorded to the selected Salesforce record.



Create a Follow Up in Salesforce

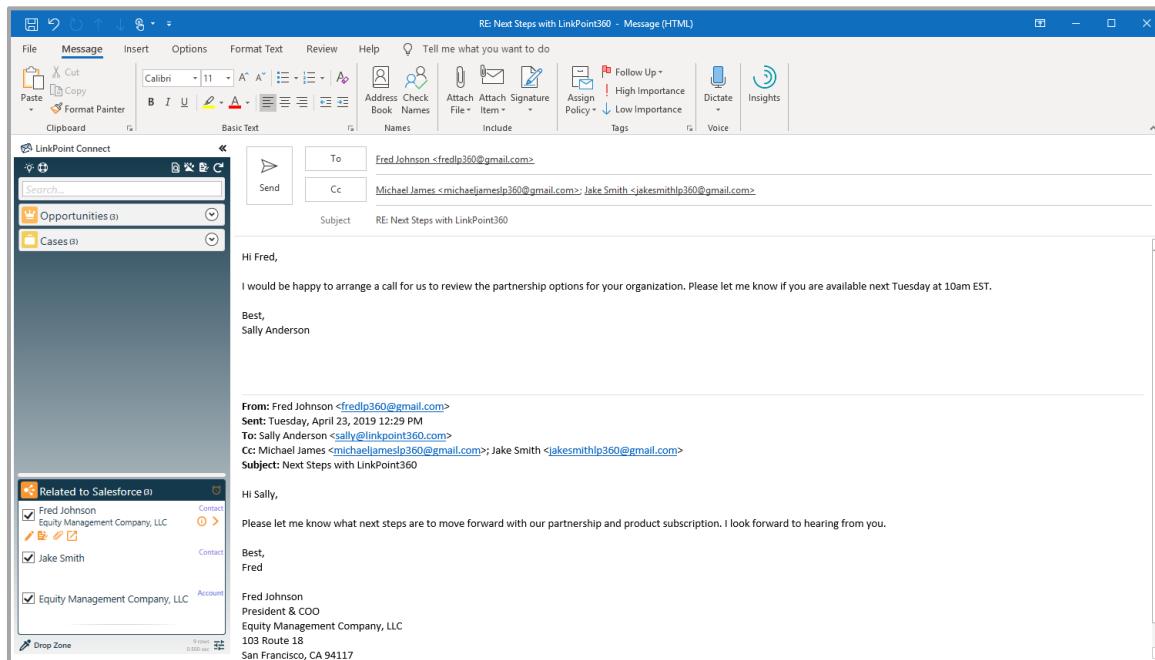
Create a follow up as a task or event in Salesforce from Outlook. This helps users plan next steps while interacting with people via email. The process is the same for inbound and outbound emails. Enable calendar and/or task sync to move follow up items from Salesforce to Outlook.



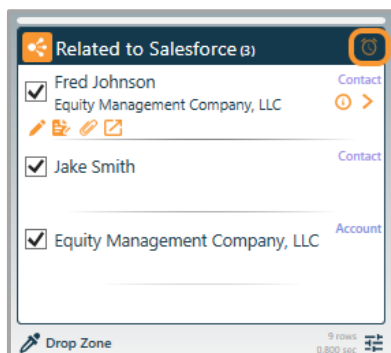
Additional Resources: Refer to the [Establish Calendar Auto Sync Settings](#) and [Establish Task Auto Sync Settings](#) sections of this User Guide for more information.



Select or compose an email, and select the record(s) to relate the item to in Salesforce. At least one record must be selected to create a related follow up.

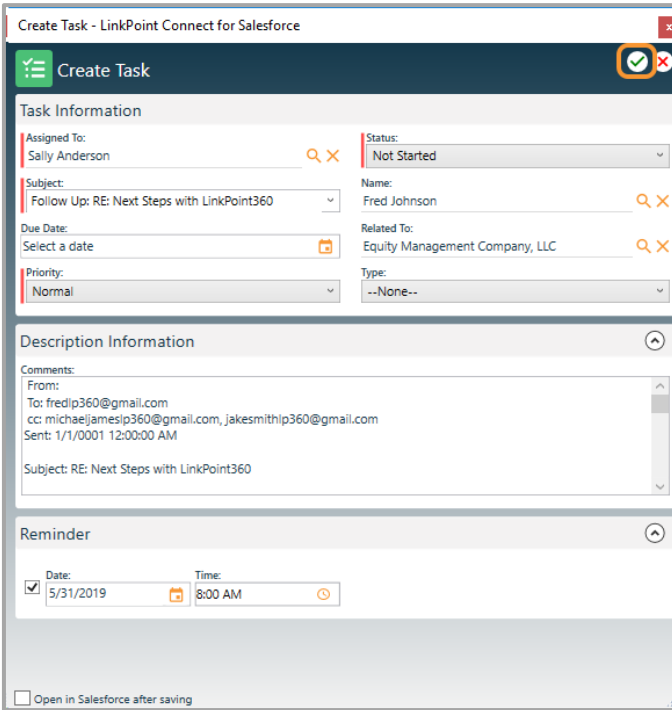


Click the **Follow Up** icon in the **Related to Salesforce** section in the Side Panel. Note the icon color is a dull orange indicating that a follow up has not been created yet.

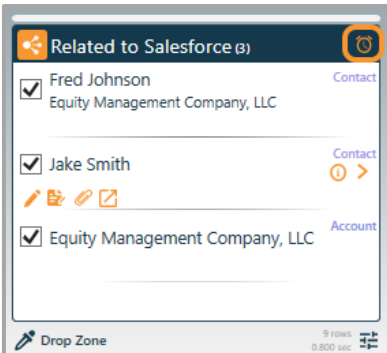


Additional Resources: The default type for follow ups is tasks. Users can change the default to events in the Preferences Pane. Refer to the [Edit Preferences](#) section of this User Guide for more information.

- 3 Review the **SnapForm**. Note that some fields such as Subject, Description, and related records have been prepopulated based on the email content. Edit as needed, complete all required fields, and click the **green checkmark** to create the item in Salesforce.



- 4 Click the **Follow Up** icon in the **Related to Salesforce** section in the Side Panel to edit the item. Note the icon color is a bright orange indicating that a follow up exists and is available for editing.



Track Emails

Track Email Opens

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. LinkPoint Tracker is enabled by default. This feature injects a 1x1 pixel image into all outbound emails. If/when the image is downloaded, Tracker is able to collect open details for the email. Emails to recipients who do not download this pixel and/or have blocking in place will not provide tracked data.



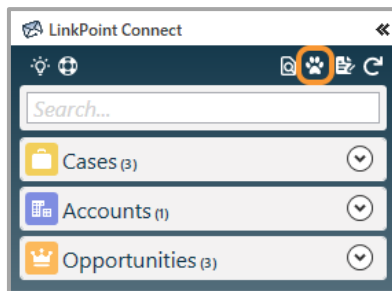
Additional Resources: Users can change the default behavior for LinkPoint Tracker in LinkPoint Assist. Refer to the [Configure LinkPoint Tracker](#) section of this User Guide for more information.

1

Compose an outbound email, and select the record(s) to relate the item to in Salesforce.

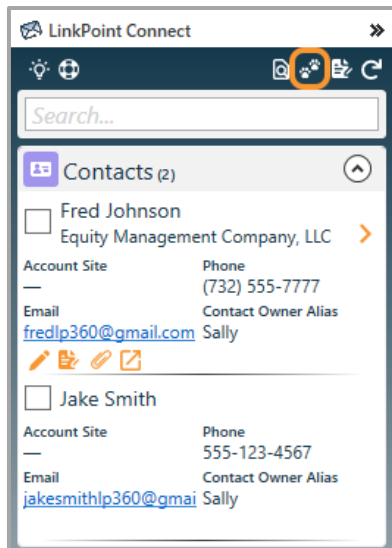
2

Locate the **Track Email** icon in the Side Panel. The Track Email icon will display in full if the item is set to be tracked. The icon will appear grayed out if tracking is not enabled for the email. Click the **Track Email** icon to enable or disable email tracking for the item as needed. Send the email.



3

Click the **Tracked Email History** icon in the main Side Panel to view the status of all emails that are being tracked by the user in the Outlook account.



Tip: Emails may not include tracking if LinkPoint Tracker is disabled or if an email reply does not include the tracking pixel from the original tracked email. Emails sent and received in the same IP address will not be tracked. This helps limit the number of internal emails sent that do not need tracking.

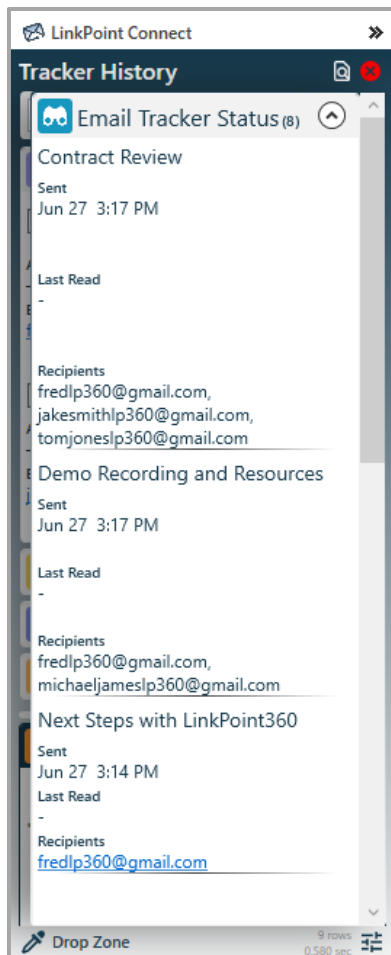


Tip: When a tracked email is opened, a pop-up notification will display in real time, alerting the user that the email recipients are currently active.

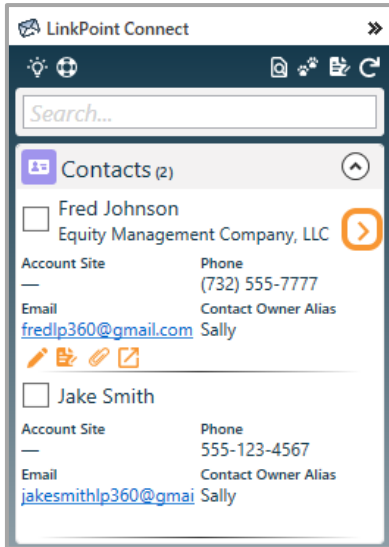


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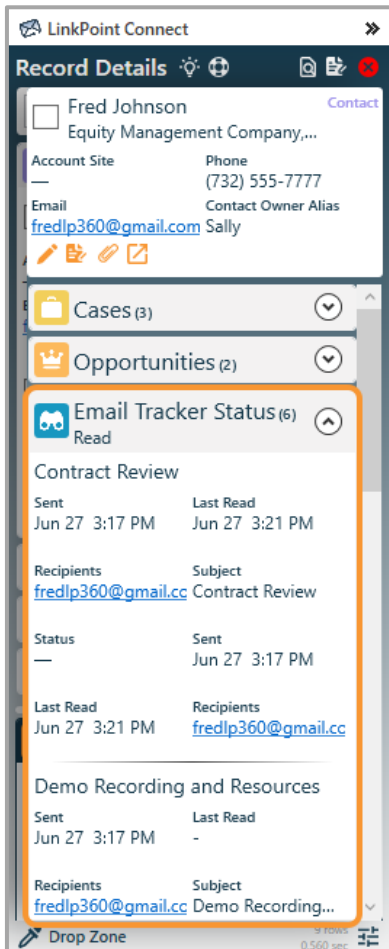
View a list of all tracked emails in the **Tracker History** pane. This provides a summary of the items sent and their read status.



- 5 Return to the Side Panel Search Results, and click the **Record Details** icon to view complete information for a Salesforce record.

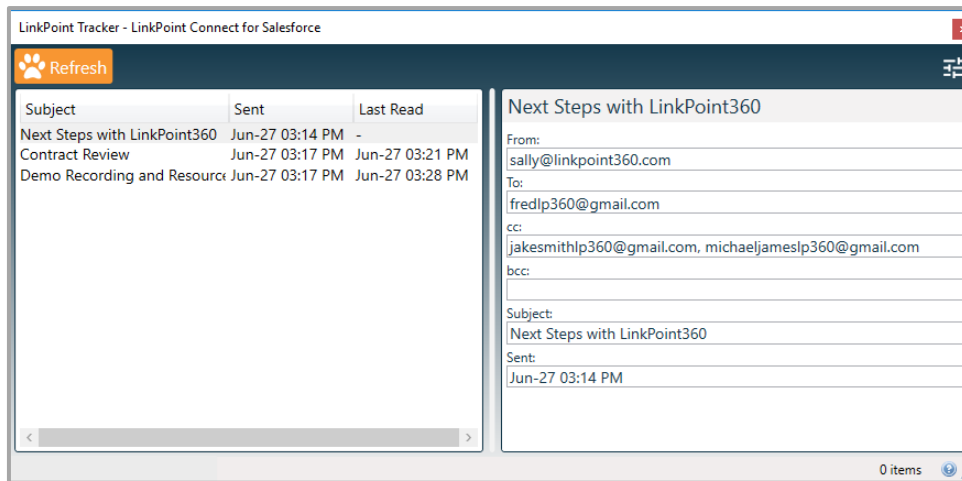


- 6 Locate the **Email Tracker Status** section and expand as needed to view **Last Read** and **Status** details for each email related to the selected Salesforce record.





Tip: Users can launch the full LinkPoint Tracker window from LinkPoint Assist. Items can be filtered, searched, and reviewed. Email tracking data is stored for a maximum of 30 days.



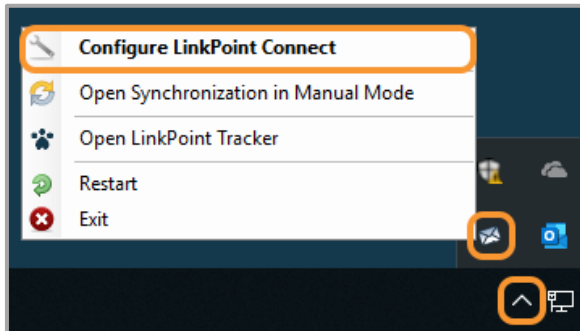
Tip: LinkPoint Tracker will indicate if an email is opened and when it was last read, including some email details to help locate the correct correspondence. If tracking an email sent to multiple recipients, LinkPoint Tracker will only indicate that a person has opened the email. It will not distinguish which of the recipients opened the email.

Configure LinkPoint Tracker

Adjust LinkPoint Tracker settings for tracking outbound email opens. Settings are managed in LinkPoint Assist.

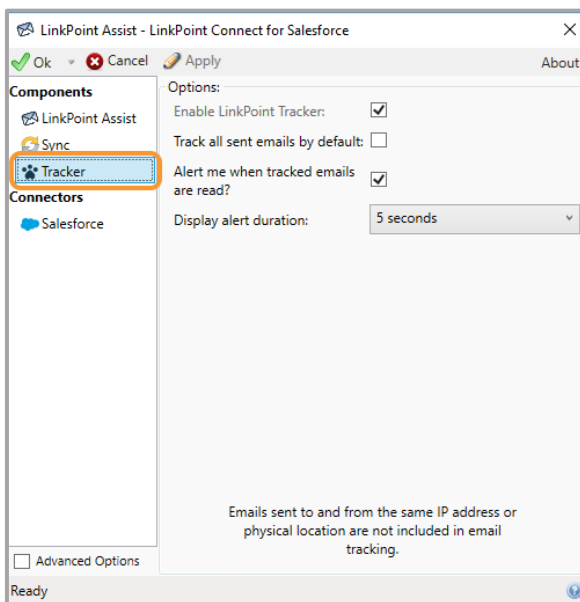
1

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



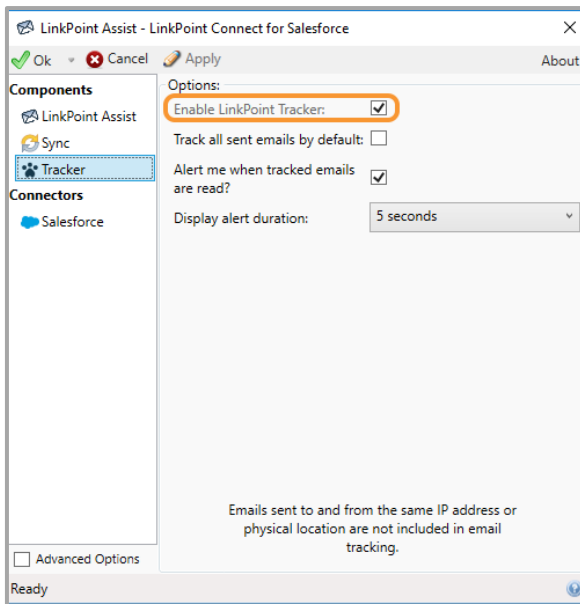
2

Select **Tracker** from the **Components** list in the **LinkPoint Assist** window, and review the available options.



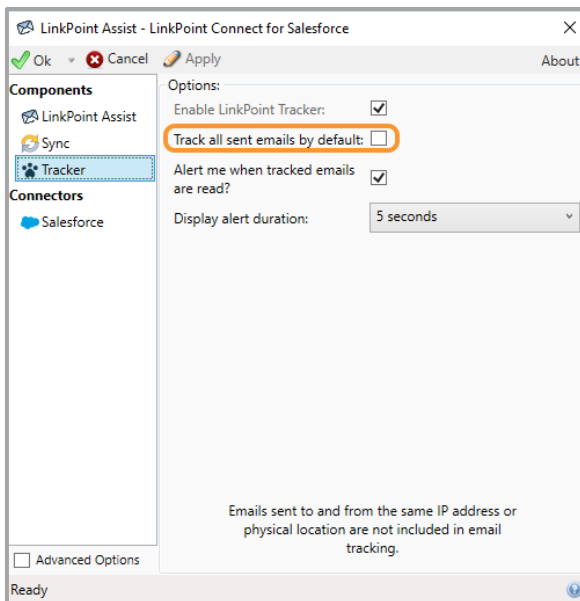
3

Select **Enable LinkPoint Tracker** to show tracking options throughout the Side Panel. This setting is enabled by default.

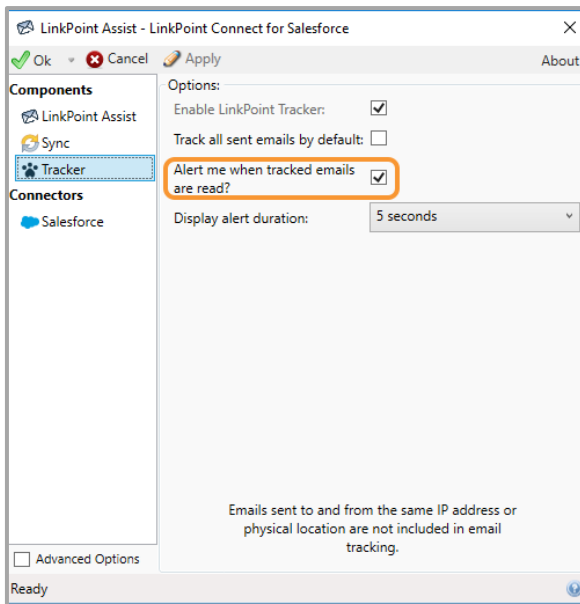


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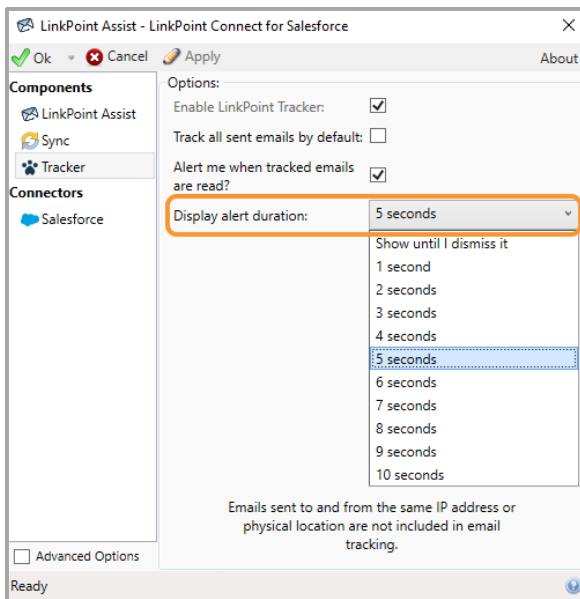
Select **Track all sent emails by default** to enable tracking on all outbound emails. Leave the setting unchecked to one-off enable tracking for select emails.



- 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 **Display alert duration**, and select an option from the drop-down list to determine how long the pop-up notification should be displayed.



- 7 Click the **Apply** button to confirm the selection(s), and click the **OK** button to finish and exit LinkPoint Assist.

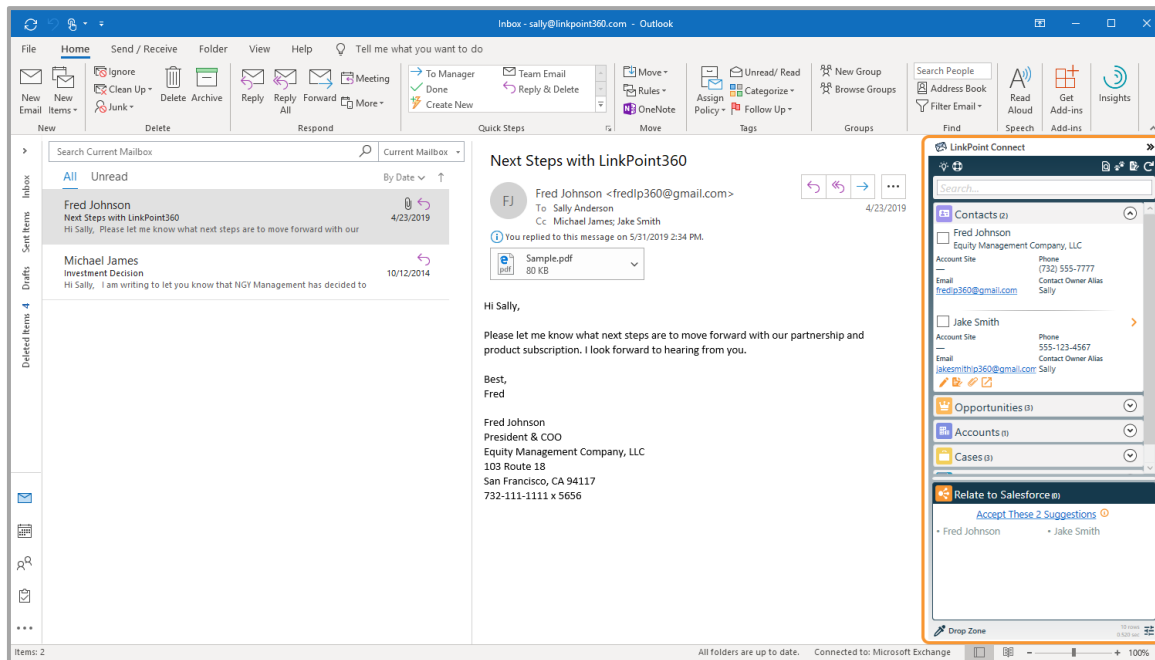
View Data

Display the Side Panel

Remain in Outlook and work with Salesforce data in real time. The Side Panel presents related records based on sender and/or recipient email addresses. Users can create or edit data, record emails, view record details, and take additional action on Salesforce records from the Side Panel. The Side Panel can be expanded or collapsed to allow for additional desktop space.

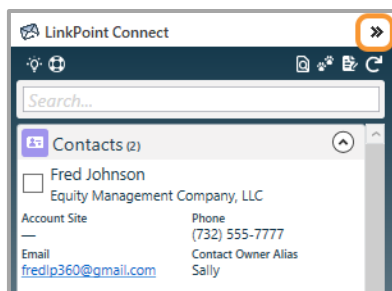
1

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

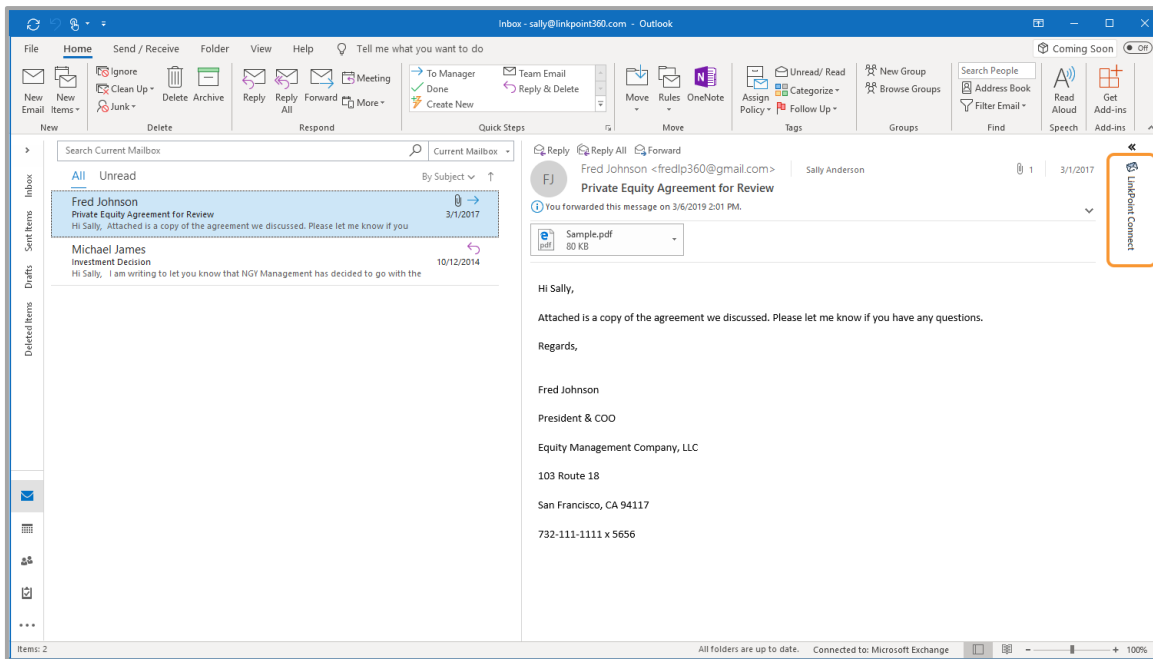


2

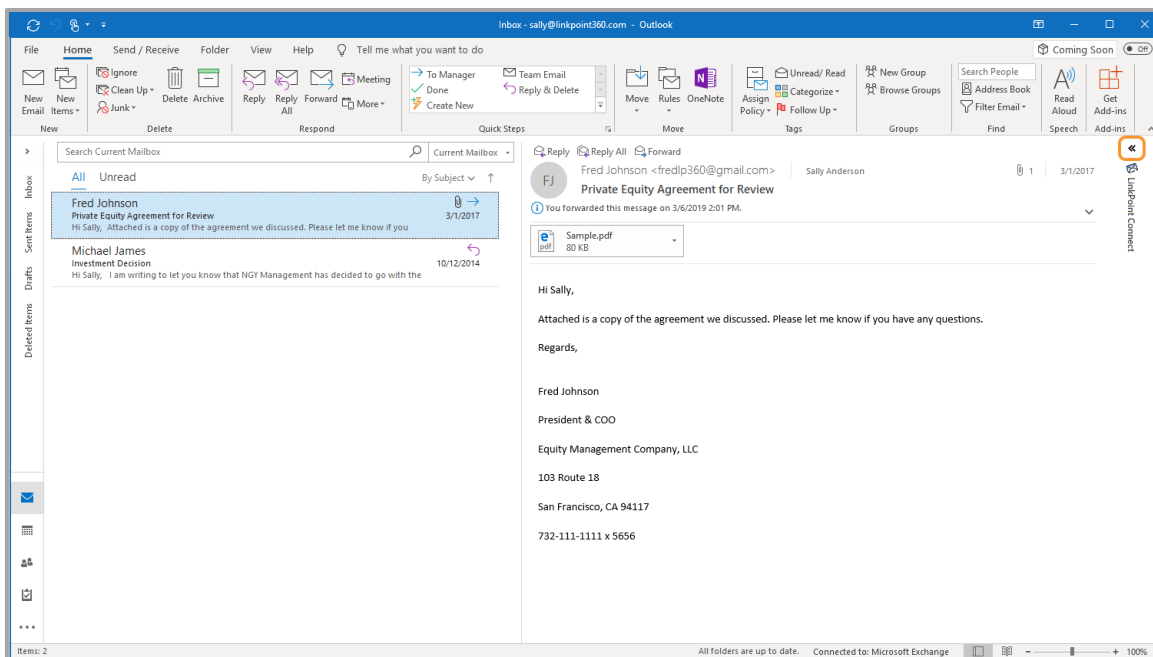
Click the >> button in the top-right corner to collapse the Side Panel.



- 3 Click the **LinkPoint Connect** button to Quick View the Side Panel. Quick View provides temporary, pop-out access to the Side Panel. Click anywhere outside of the Side Panel to hide it again.



- 4 Click the << button in the top-right corner to expand and dock the Side Panel.










View Salesforce Data in Outlook

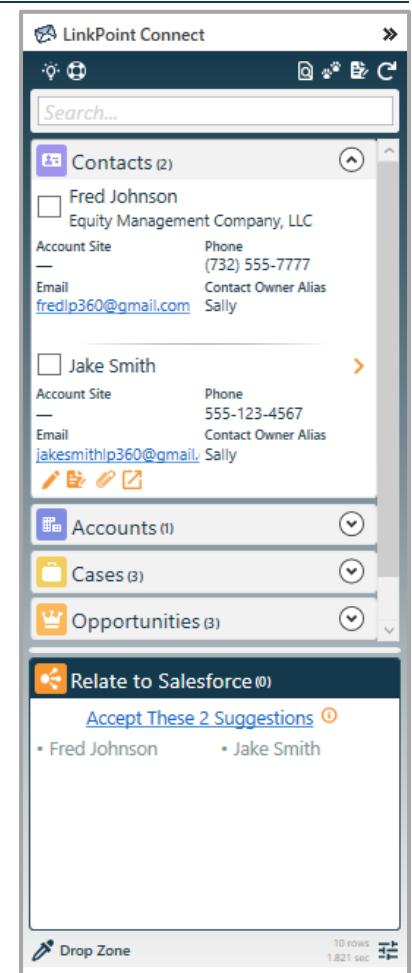
View Salesforce records based on sender and/or recipient email addresses or dynamic search. The Side Panel provides an area to create or edit data, record emails, view record details, and take additional action on Salesforce records.



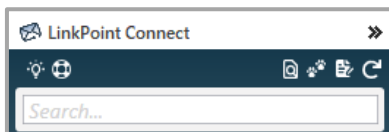
Additional Resources: Users can further refine the Salesforce objects and fields included throughout the Side Panel in the Preferences Pane. Refer to the [Edit Preferences](#) section of this User Guide for more information.

Global Icons: Use the Global Icons for general actions.

Icon	Name	Action
	Resources	Access help articles, videos, and release documentation
	Help Mode	Enable Help mode to view contextual feature explanations
	Quick Find	Search for records in the current Search Results
	Tracked Email History	Display email tracking history for all of a user's tracked emails
	Create New Records	Create a new Salesforce record in a SnapForm
	Refresh	Reset the Search Results
	Preferences	Adjust Side Panel display, search, and email recording preferences



Search Bar: Search for additional Salesforce records based on name, email address, or other keywords. Search requires a minimum of three characters and can query up to 100 characters.



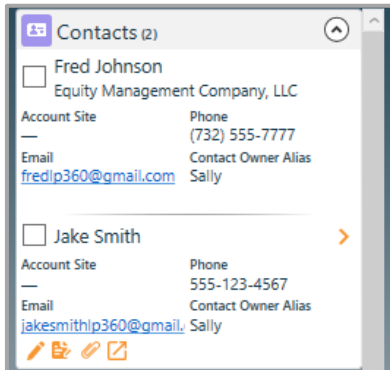
Object Groups: View records grouped in the Side Panel by Salesforce object. The number to the right of the object name indicates the number of records found for the search for that object.



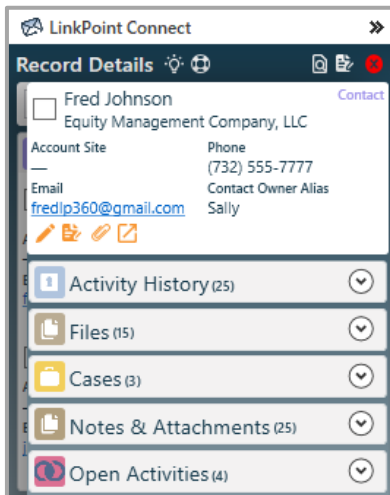


Tip: The maximum number of records that can be returned for an object in the Search Results is 99. If there are more than 99 items in Salesforce that match the search requirements, consider adding more keywords to the search to narrow down the results. Users can also view the Record Details for a Snapshot and then review the related records for a particular object.

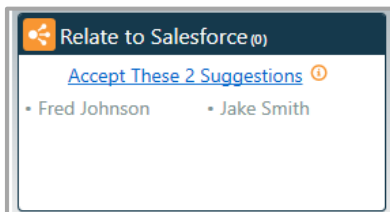
SnapShots: View high-level details for Salesforce records in the Search Results. SnapShots are grouped by Salesforce object. Expand or collapse the object groups as needed. Click the **Record Details** > icon to view complete information for a record. The Record Details icon is available if the record in Salesforce has data in related lists.



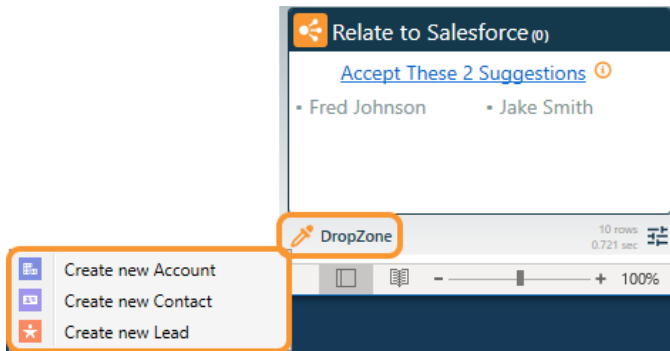
Record Details: View complete information for a selected Salesforce record. Click the **Record Details** > icon on any SnapShot. Record Details presents the selected record along with all of the records from the related lists on the object page layout in Salesforce. Click the **Expand** ☺ icon to view all record SnapShots for an object in the Record Details. Click the **Collapse** ☹ icon to minimize the results for the object.



Relate to Salesforce: View the list of records that an item has been recorded to in Salesforce. If an item has not yet been recorded, the section will list suggested records for consideration.









Drop Zone: Create new Salesforce accounts, contacts, and leads using email signatures.



Additional Resources: Refer to the [Drag and Drop to Create Salesforce Records](#) section of this User Guide for more information.

Shortcut Icons: Act on the data presented throughout the Side Panel.

Icon	Name	Action
	Edit Record	Edit an existing Salesforce record in a SnapForm
	Create New Records	Create a new Salesforce record in a SnapForm
	Drag & Drop Files	Records attachments to the selected Salesforce record with drag and drop
	Open Record	Launch the record in Salesforce via a web browser
	Record Details	View expanded record details
	Create Follow Up	Create a related follow up task or event in Salesforce

Configure Display and Search Settings

Configure the Side Panel to display information relevant to user workflow. The Side Panel presents related records based on sender and/or recipient email addresses. Users can create or edit data, record emails, view record details, and take additional action on Salesforce records from the Side Panel. Data is presented for SnapShots, Search Results, and SnapForms based on a number of default settings. In some cases, display and search options can be modified by users or Salesforce admins.





Additional Resources: Users can further refine the Salesforce objects and fields included throughout the Side Panel in the Preferences Pane. Refer to the [Edit Preferences](#) section of this User Guide for more information.

Object Arrangement

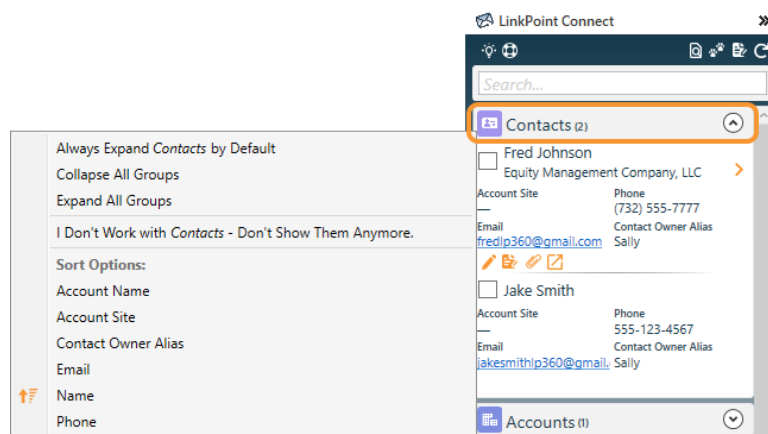
Objects can be arranged in the Side Panel to reflect a user's preferred order. Click and hold down any object group. Drag and drop the object group to the desired position in the Side Panel. Note that object groups appear relative to the displayed Search Results. Subsequent Search Results presenting a different combination of objects may or may not continue to reflect the placement changes.




Example: A user reviews Search Results containing Cases, Contacts, and Opportunities. The user moves Opportunities to the top of the list. In a later search, Accounts are included and appear at the top of the Side Panel. The user would need to move Opportunities above Accounts to adjust the placement based on the current Search Results.

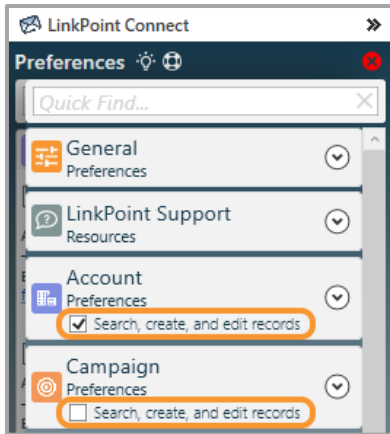
Click the **Expand**  icon to view all SnapShots for an object in the Search Results. Click the **Collapse**  icon to minimize the results for the object.



Right click any object group in the Search Results to choose from a menu of display options. These options allow users to set new default behavior for viewing records including Search Results sort order.

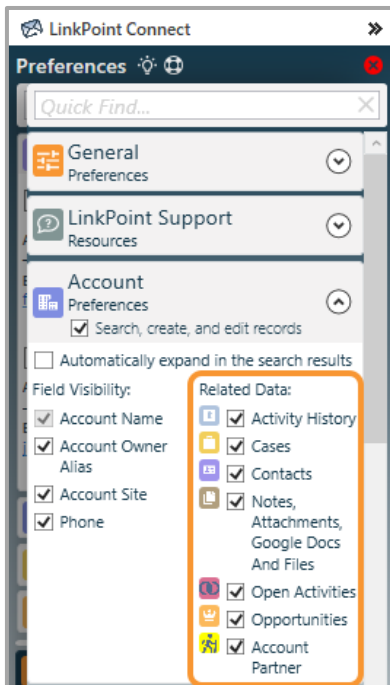


Search Results

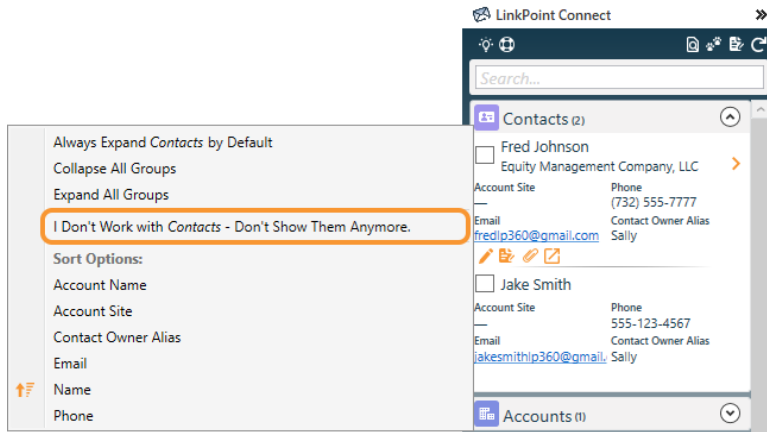
Side Panel search functionality includes robust record lookup based on object and record names as well as field-level data in Salesforce. Objects are displayed in the Search Results as an option to record emails to if they include the Activity History related list in Salesforce. Objects that do not include Activity History may still be visible in the Record Details pane to show relevant related list data. Users can exclude or include Salesforce objects in the Search Results. Click the **Preferences**  icon in the Side Panel and locate an object in the list. Enable or disable the checkbox to **Search, create, and edit records** as needed.



When viewing Record Details, all related lists for the record are displayed in the Side Panel. Users can exclude or include these related lists in the Record Details Search Results. Click the **Preferences**  icon in the Side Panel and locate an object in the list. Click the **Expand**  icon. Enable or disable the related list(s) using the **Related Data** checkbox(es).



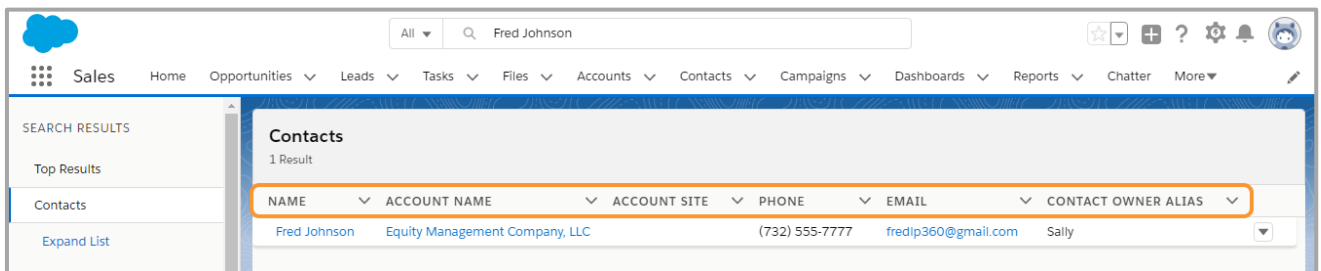
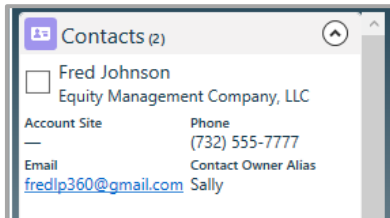
Users can completely exclude an object from all Search Results including the Record Details pane. Right click the object name in the Search Results. Select the option to **I Don't Work with [Object Name] – Don't Show Them Anymore**.




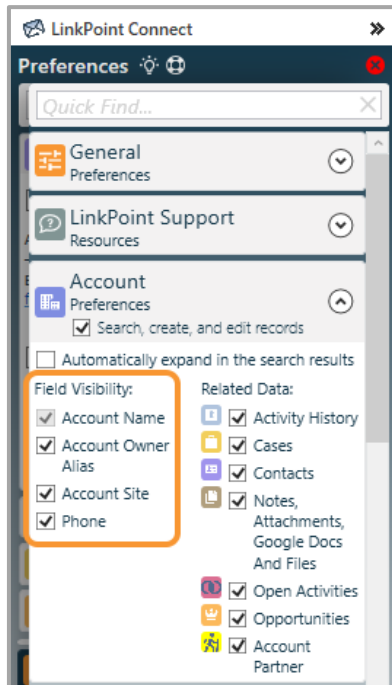
SnapShots

SnapShots display high-level Salesforce details for records throughout the Side Panel. In the Search Results, the SnapShot will show up to 10 fields. This display is unique to each customer's Salesforce configuration and is driven by the search page layout for the object. These are automatically detected and refreshed once daily by LinkPoint Connect. Customers who wish to change the fields or arrangement of fields in the SnapShot will require a Salesforce admin to update the search page layout for the object(s).

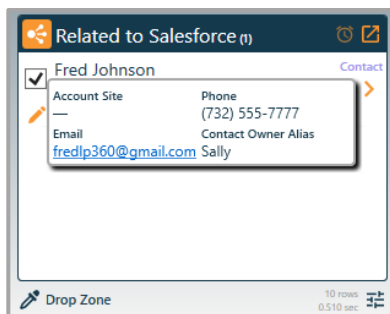
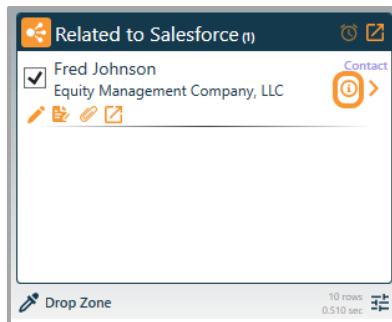
For example, contact records will show the fields and values that match the contact search screen in Salesforce.



Users can display or hide discovered Salesforce fields in a SnapShot with different settings for each object. Click the **Preferences**  icon in the Side Panel and locate an object in the list. Click the **Expand**  icon to view all of the available fields for the object SnapShot. Enable or disable the fields using the **Field Visibility** checkbox(es).

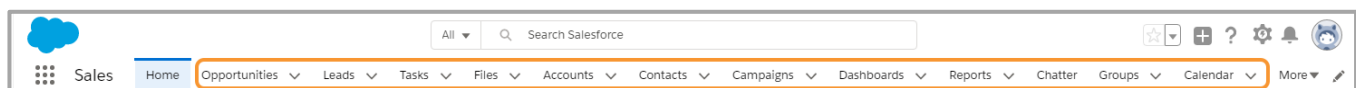


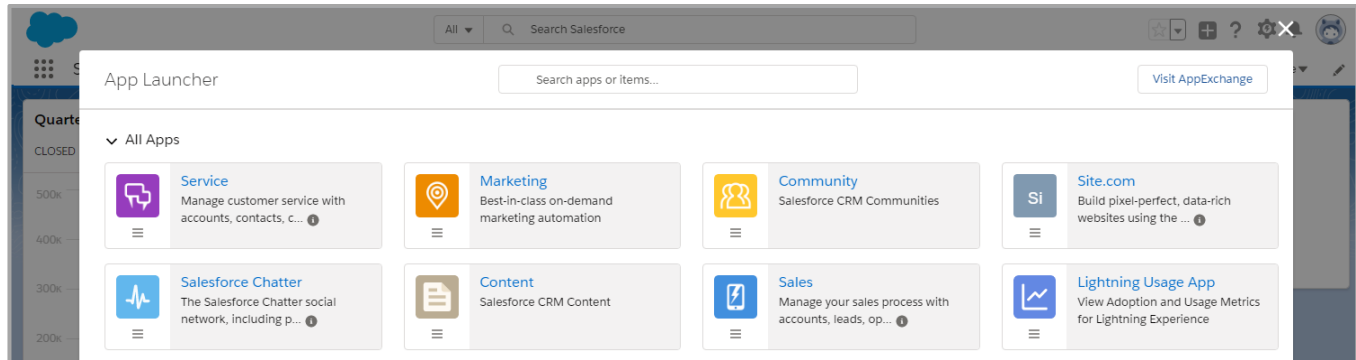
SnapShots are available in the **Related To Salesforce** section of the Side Panel in a Compact view. Mouse over the info icon to view content.




SnapForms


SnapForms provide Salesforce record creation and editing functionality in Outlook. SnapForms are unique to each customer's Salesforce configuration and follow each user's individual Salesforce permissions for creating and editing records. Available SnapForms are automatically detected and refreshed once daily by LinkPoint Connect. Objects are available in the Side Panel if they are included as tabs in the user's Salesforce instance in any Salesforce App the user has access to. The task and event objects are included by default for all users.



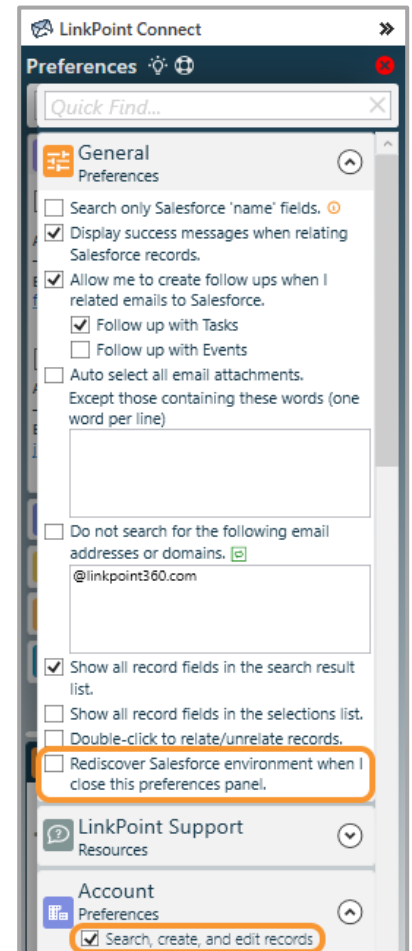


The complete list of available objects for SnapForms is listed in the Preferences Pane in the Side Panel for each user. Objects are enabled as SnapForms in the **Create New Records** menus if the user has access to and has also actively engaged with the object in Salesforce. Objects can be enabled for SnapForm usage. Click the **Preferences**  icon in the Side Panel and locate an object in the list. Enable or disable the checkbox to **Search, create, and edit records** as needed. Note that disabling an object will also remove its records from the Search Results.

SnapForm fields are driven by the object page layout in Salesforce. These are automatically detected and refreshed once daily by LinkPoint Connect. Record types are supported, where applicable. All required fields are presented with an indicator. All fields types, including dependent fields and picklists, are supported by default with the exception of formula fields, geolocation fields, and fields driven by external data in third-party applications. SnapForm field layout will reflect the order, groupings, labels, and tool tips as they are displayed in Salesforce. Customers who wish to change the fields or the arrangement of fields in the SnapForm will require a Salesforce admin to update the page layout for the object(s) in Salesforce.

SnapForms are updated once every 24 hours automatically by LinkPoint Connect if there are changes to the object(s) or field(s) in Salesforce. Users can individually force a rediscovery for SnapForms. Click the **Preferences**  icon in the Side Panel and expand the option for **General Preferences**. Select the checkbox for **Rediscover Salesforce environment when I close this preferences panel**. Users will need to enable the new object(s) to be searchable and useable as SnapForms. These objects will be listed in the Preferences Pane for the user to select the option to **Search, create, and edit records** as needed.

All Salesforce object names, fields, labels, validation messages, and tooltips will be displayed in the user's language as configured in Salesforce. LinkPoint Connect labels and settings such as window titles, preferences settings, Tracker details, and help documentation are currently presented in English only.



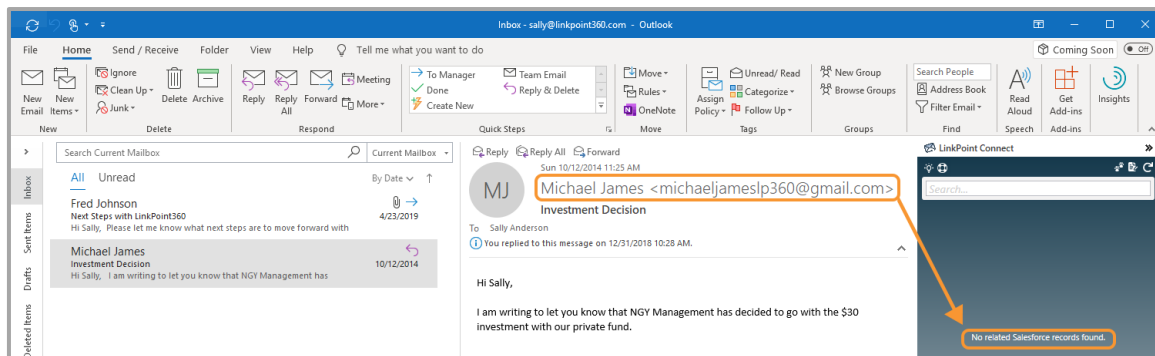
Create and Edit Records

Drag and Drop to Create Salesforce Records

Create accounts, contacts, and leads in Salesforce with minimal manual data entry. With email signatures and SnapForms, Salesforce records can be created with just a few clicks from Outlook. Drag and drop functionality works the same for all available record types. Users will have access to create new records based on Salesforce permissions.

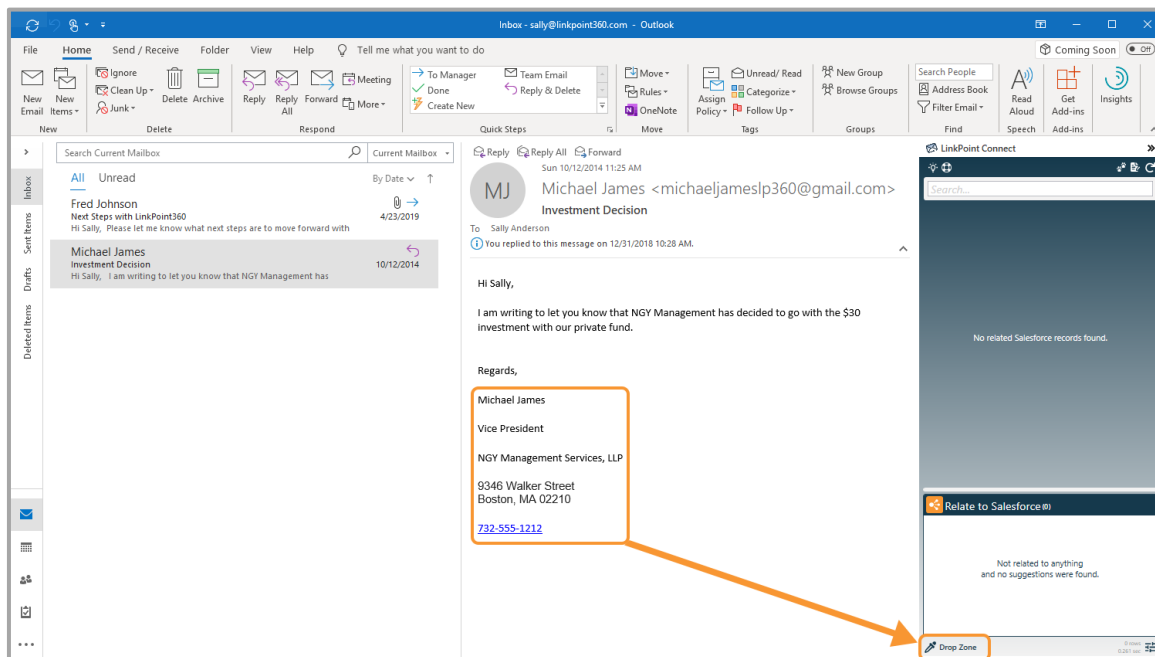
1

Select an email from a new email address. Note that the Side Panel searched Salesforce and did not find a record matching the email address.



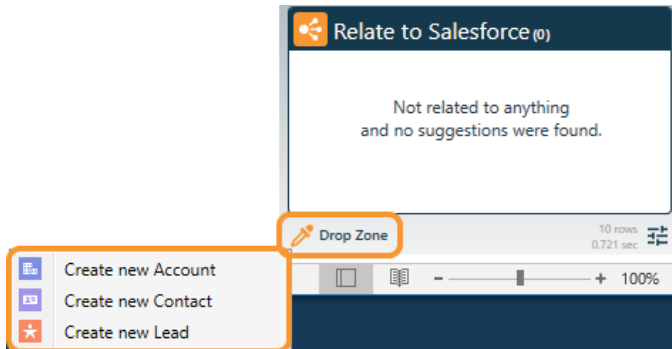
2

Highlight the signature in the email. Drag the highlighted signature to the **Drop Zone** at the bottom of the Side Panel and release the selection over the icon.



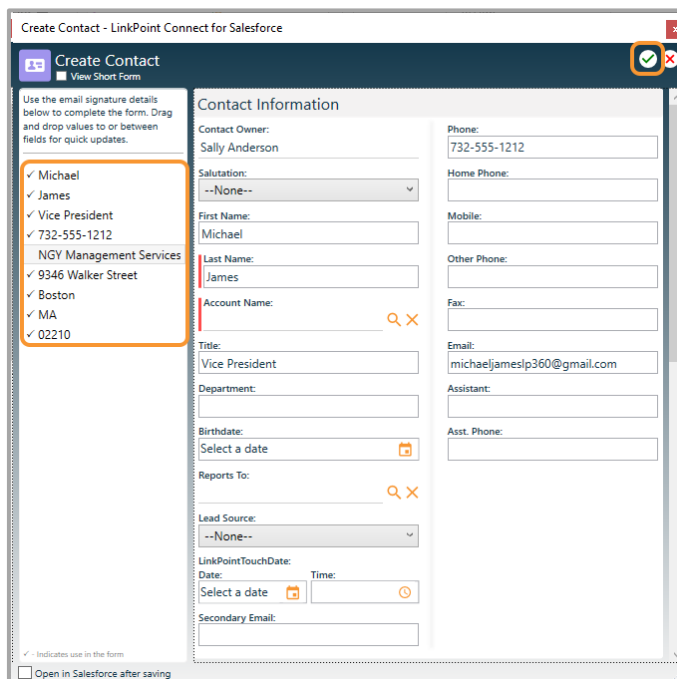
3

Select the record to create from the available list.



4

Enter any required or additional information in the **SnapForm**. Note that some fields are prepopulated based on the email signature. You can drag and drop values between fields on the form and from the Email Signature Field list on the left side of the form to make changes. Click the **green checkmark** to create the record in Salesforce.

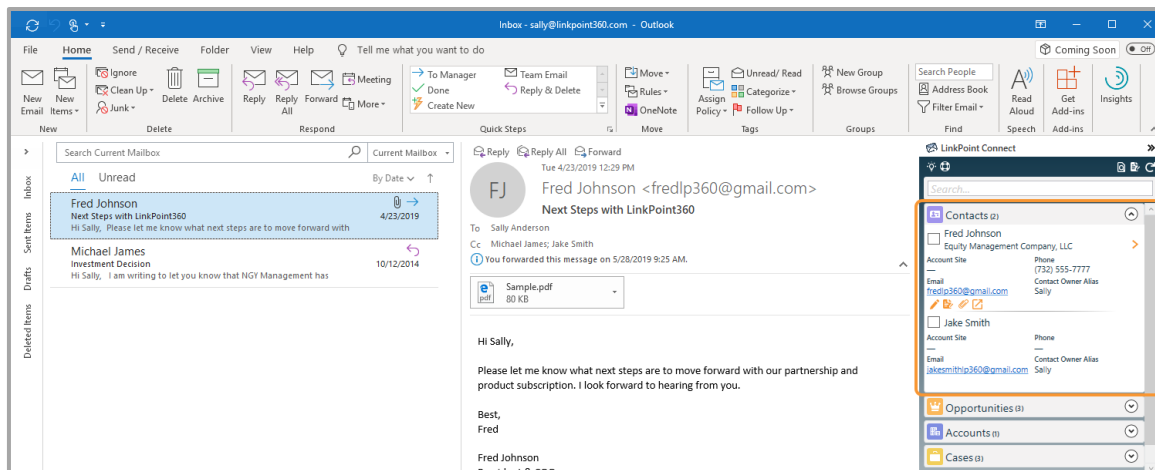


Tip: LinkPoint Connect will not override any business rules in the user's instance of Salesforce. If additional fields are required to create the record, the user will need to enter the information in order to proceed.

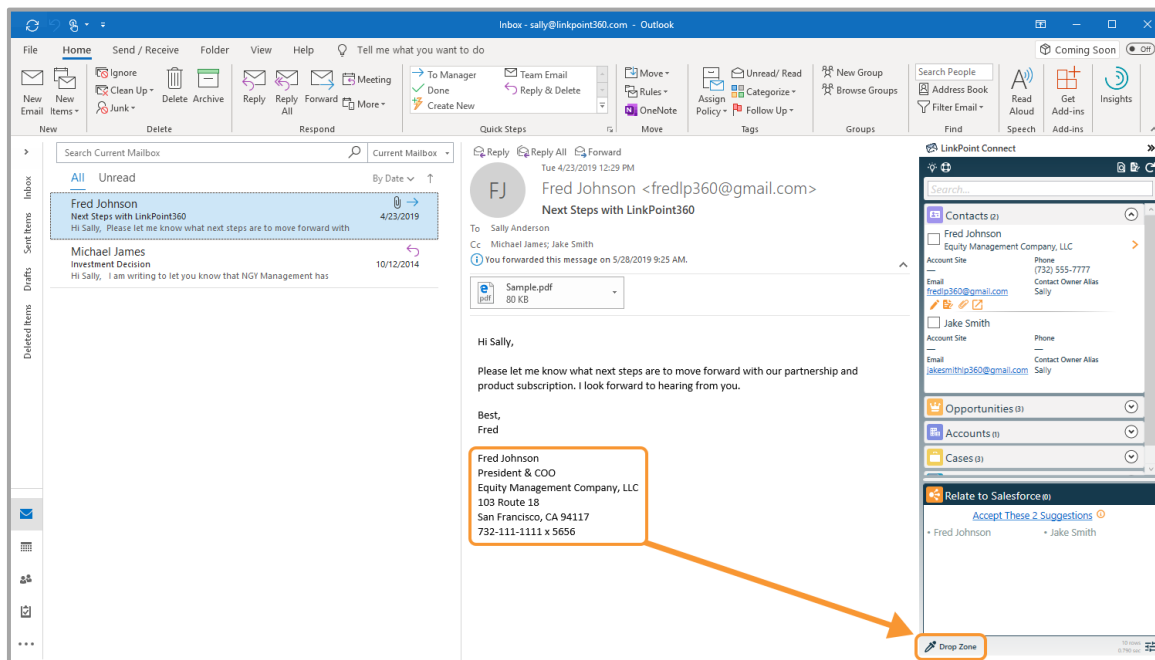
Drag and Drop to Update Salesforce Records

Update existing accounts, contacts, and leads in Salesforce with minimal manual data entry. Users can identify field-level data differences and make updates using email signatures with Active Update for SnapForms. Changes are saved to Salesforce but made from Outlook. Active Update also works as a duplicate checker, identifying matching records and prompting users to either create a new record or update an existing record. Active Update functionality works the same for all available record types.

- 1 Select an email from an existing contact or lead. Note that the Side Panel returns Search Results based on the sender and/or recipient email addresses and the related Salesforce records.

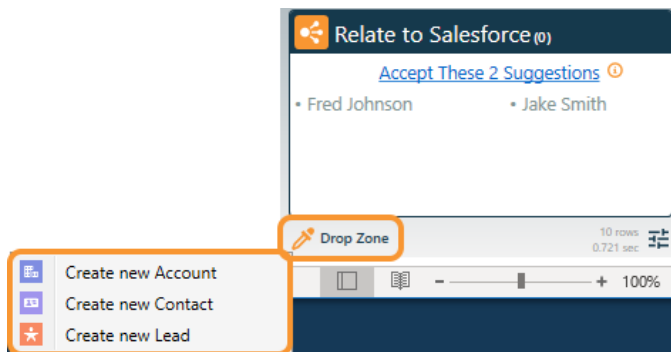


- 2 Highlight the signature in the email. Drag the highlighted signature to the **Drop Zone** at the bottom of the Side Panel and release the selection over the icon.



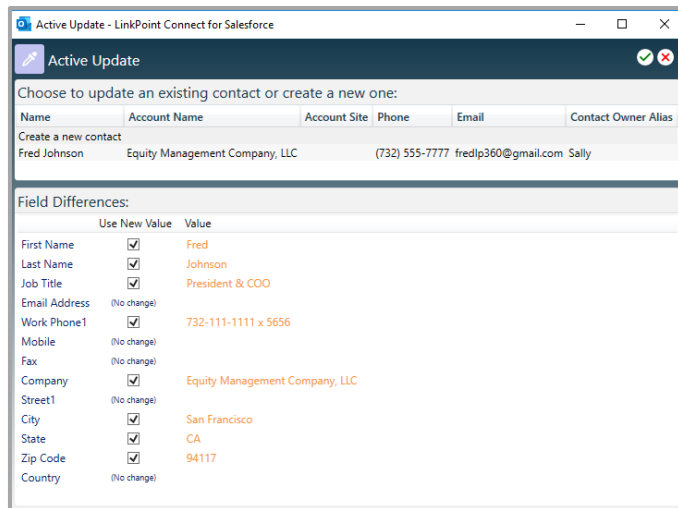
3

Select the record to update from the available list.



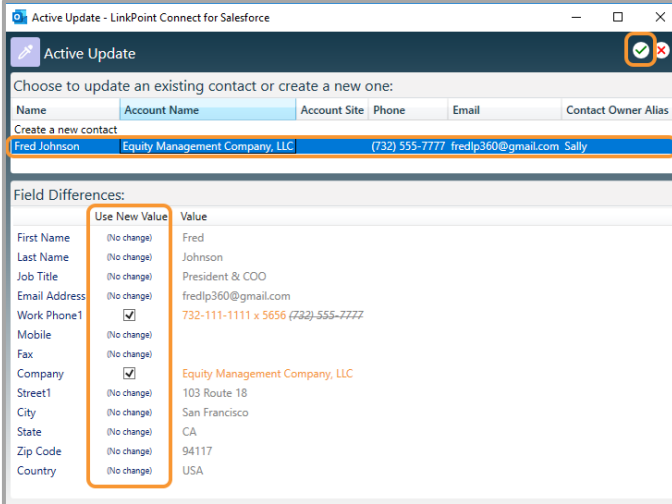
4

Review the 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. Users can review limited details to identify the correct existing record before making any changes.



Tip: Users can select **Create a new contact** to create a new Salesforce record. This will launch a new SnapForm with the record details for review. This option changes contextually when working with leads.

- 5** 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. Click the **green checkmark** to proceed.

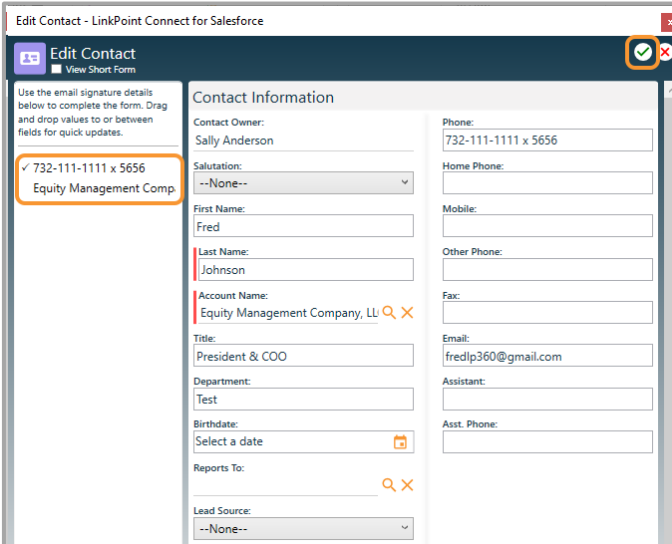


Field Differences:	Use New Value	Value
First Name	(No change)	Fred
Last Name	(No change)	Johnson
Job Title	(No change)	President & COO
Email Address	(No change)	fredip360@gmail.com
Work Phone1	<input checked="" type="checkbox"/>	732-111-1111 x 5656 (732)-555-7777
Mobile	(No change)	
Fax	(No change)	
Company	<input checked="" type="checkbox"/>	Equity Management Company, LLC
Street1	(No change)	103 Route 18
City	(No change)	San Francisco
State	(No change)	CA
Zip Code	(No change)	94117
Country	(No change)	USA



Tip: Active Update will display the field labels 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. Deselect the checkbox to display the original data from Salesforce.

- 6** Enter any required information in the **SnapForm**. Note that fields have been updated based on the selections in the Active Update window. You can drag and drop values between fields on the form and from the Email Signature Field list on the left side of the form to make changes. Click the **green checkmark** to update the record in Salesforce.




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

Create Salesforce Records with SnapForms

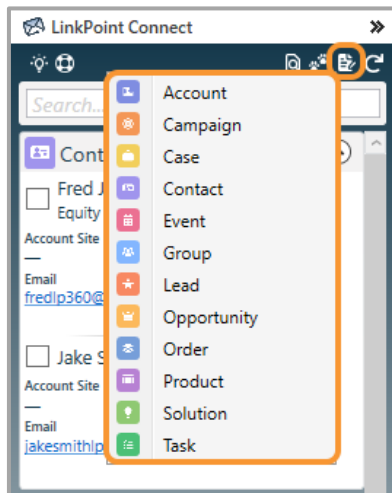
Create new records for standard and custom Salesforce objects from Outlook with SnapForms. LinkPoint Connect automatically detects the user's Salesforce objects and provides access to SnapForms for those objects. SnapForms display the fields for the object as they appear in the user's instance of Salesforce and support required and dependent fields. Where applicable, SnapForms present the record types available for an object in a drop-down list.



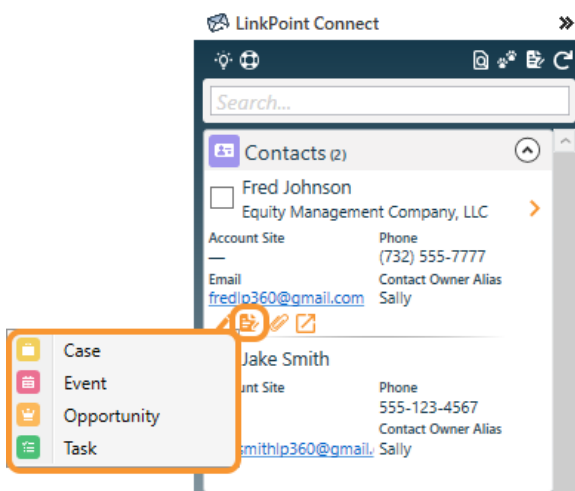
Additional Resources: Users can change the Salesforce objects available as SnapForms in the Preferences Pane. Refer to the [Edit Preferences](#) section of this User Guide for more information.



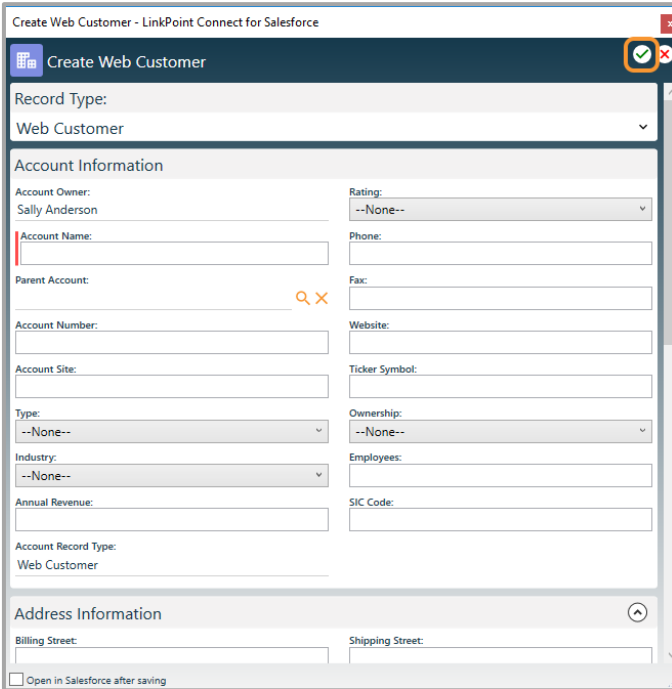
Click the **Create New Records** icon in the top-right corner of the Side Panel. This will present a list of available objects unique to each user's permissions in Salesforce. Select an option from the list to launch the SnapForm.



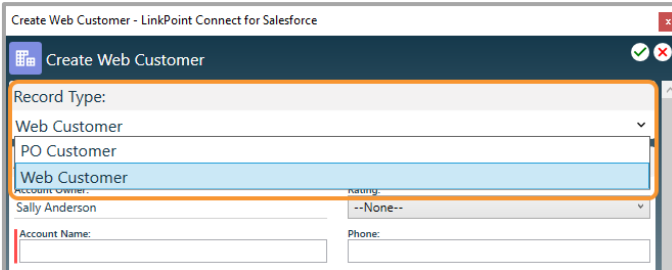
Tip: Users can also create new records contextually in the Side Panel. Click the **Create New Records** icon on any Side Panel item to view a list of available SnapForms. This may prepopulate select SnapForm fields based on the selected record, where applicable.



- 2 Enter data in the available fields in the SnapForm. Complete all required fields, and click the **green checkmark** to create the item in Salesforce.



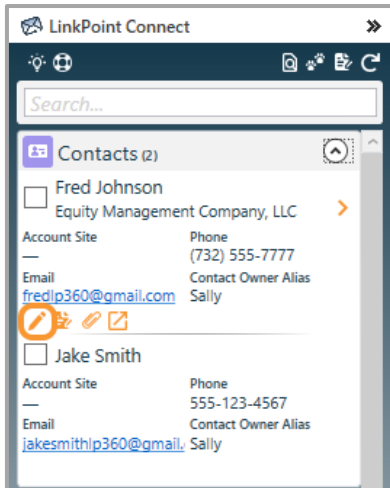
Tip: Users can select a record type for Salesforce objects, where applicable. Select the **Record Type** from the drop-down list at the top of the SnapForm. The fields on the SnapForm will change dynamically based on the selection.



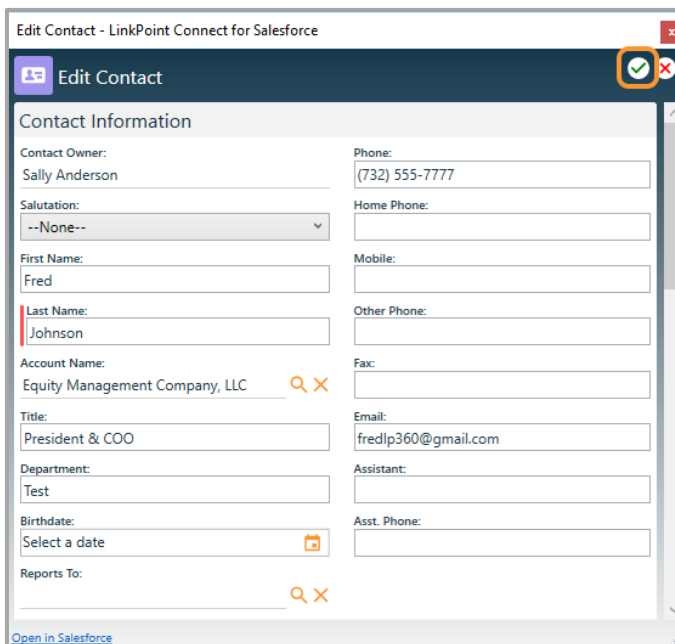
Edit Salesforce Records with SnapForms

Edit records for standard and custom Salesforce objects from Outlook with SnapForms. Edit access in the Side Panel mirrors the user's access in Salesforce. SnapForms display the fields for the object as they appear in the user's instance of Salesforce and support required and dependent fields. Where applicable, SnapForms support and present record type options from a drop-down list.

- 1 Locate a Salesforce record in the Side Panel, and click the **Edit Record** icon to launch the SnapForm. These icons are available for all records the user has access to edit in Salesforce.



- 2 Edit data in the available fields in the SnapForm, and click the **green checkmark** to update the record in Salesforce.



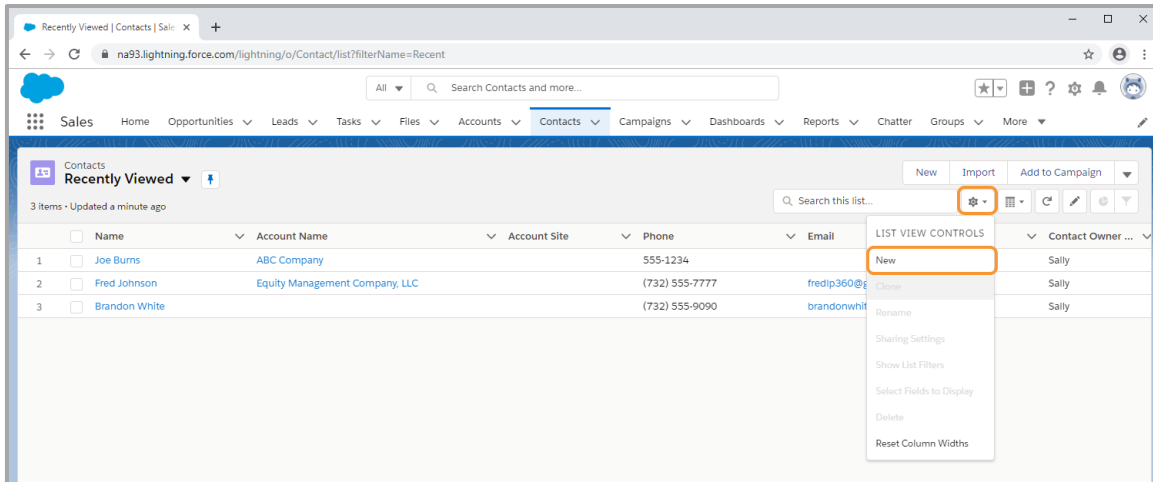
Additional Resources: Users can also edit records with SnapForms by using the drag and drop feature, which checks account, contact, and lead data for changes in information based on email signatures. Refer to the [Drag and Drop to Update Salesforce Records](#) section of this User Guide for more information.

Work with Short Forms

SnapForms typically display a large number of fields and sections based on existing Salesforce Page Layouts and user permissions. In some cases, working with a shorter version of the form makes users more productive, such as when working with record updates. Short Forms allow users to restrict fields for creating and editing SnapForms with controls set in Salesforce.

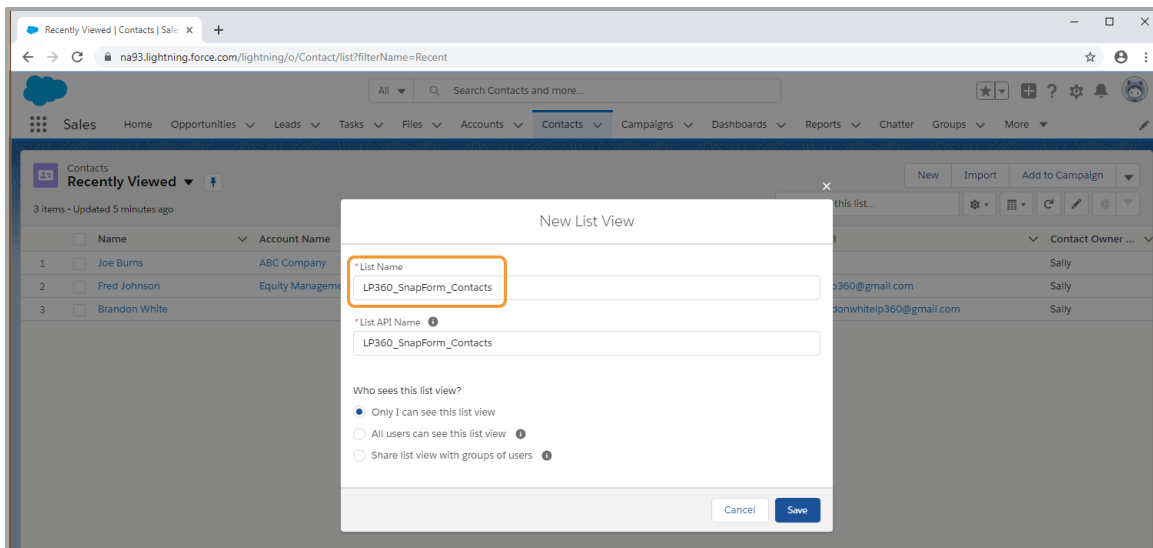
1

Create a new **View** in Salesforce for an Object that requires Short Form configuration.



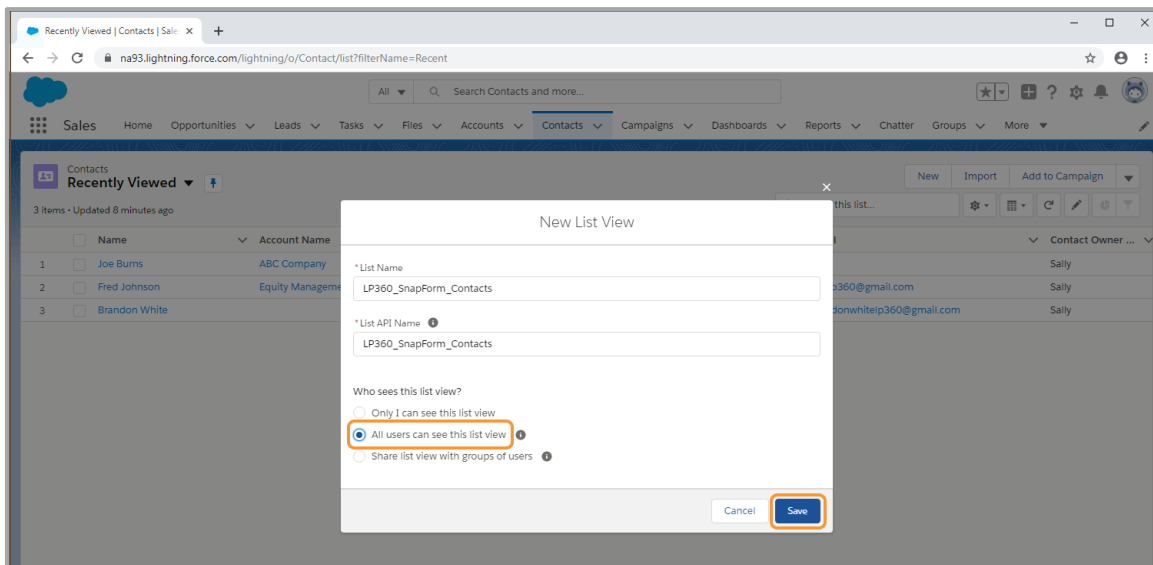
2

Start the **List Name** with `LP360_SnapForm` and allow the List API Name to autopopulate.



3

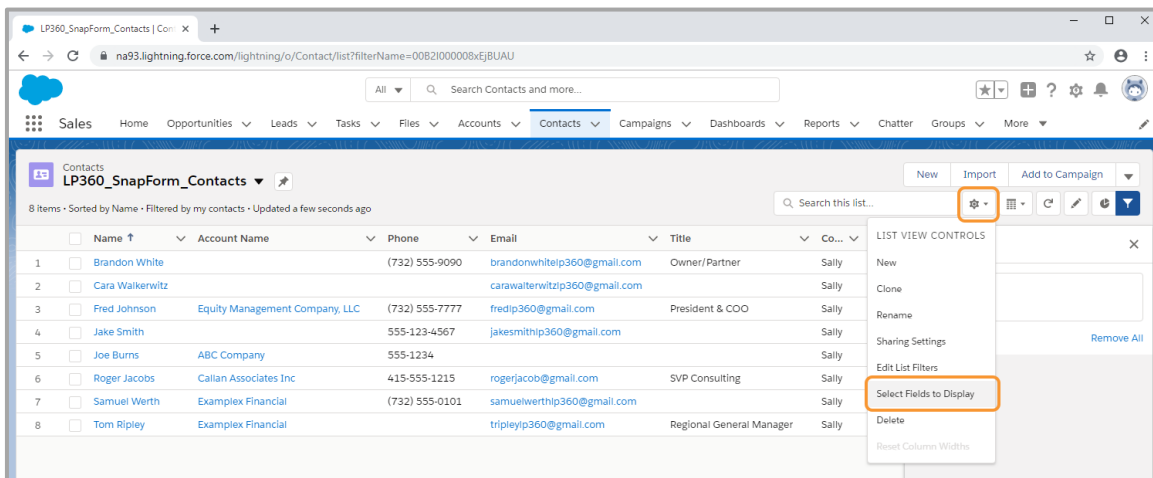
Set the visibility to **All users can see this list view** to make the configuration available to all users in the LinkPoint Connect license. Click the **Save** button.



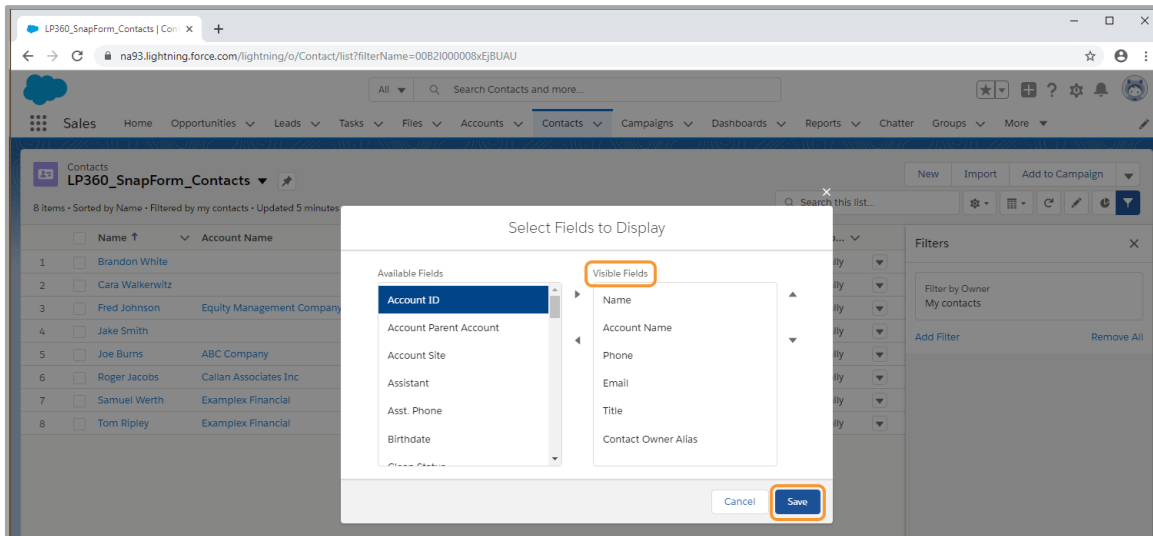
Tip: LinkPoint Connect checks to see if each user has a Short Form List View that they create themselves first. If no personal View is found, the system will check for a global option, as described in Step 3 above. If both exist, LinkPoint Connect presents the Short Form based on the user's criteria, not the global criteria.

4

Click the **View List Controls** button and select the option to **Select Fields to Display**.

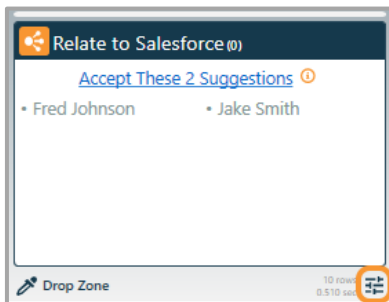


- 5 Select the fields to display in the Short Form version of the SnapForm by adding Available Fields to the **Visible Fields List**. Any fields selected will be included, in the order presented, in the Short Form. Click **Save**.

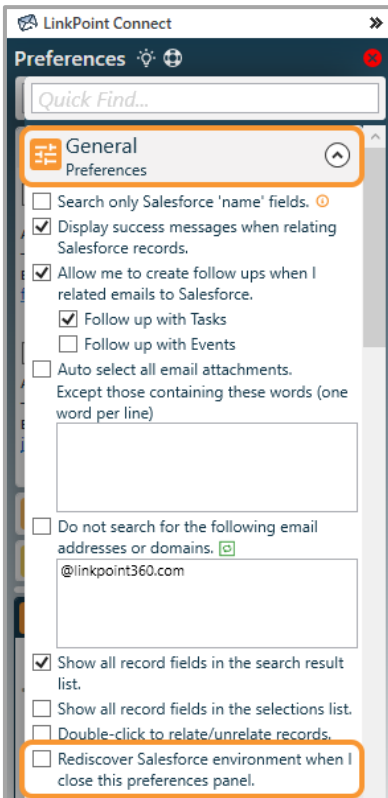


Tip: Be sure to include any Required Fields for the Object at this time. If you exclude Required Fields and a user attempts to save changes to a Short Form, they will receive a validation error and must expand to the full SnapForm to proceed. Adding the Required Fields at this stage reduces user clicks and confusion.

- 6 Click the **Preferences** icon in the bottom-right corner of the Side Panel in Outlook.



- 7 Expand the General Settings section and select the checkbox to **Rediscover Salesforce Environment when I close this preferences panel**. Close the Preferences Pane when done.




LinkPoint Connect

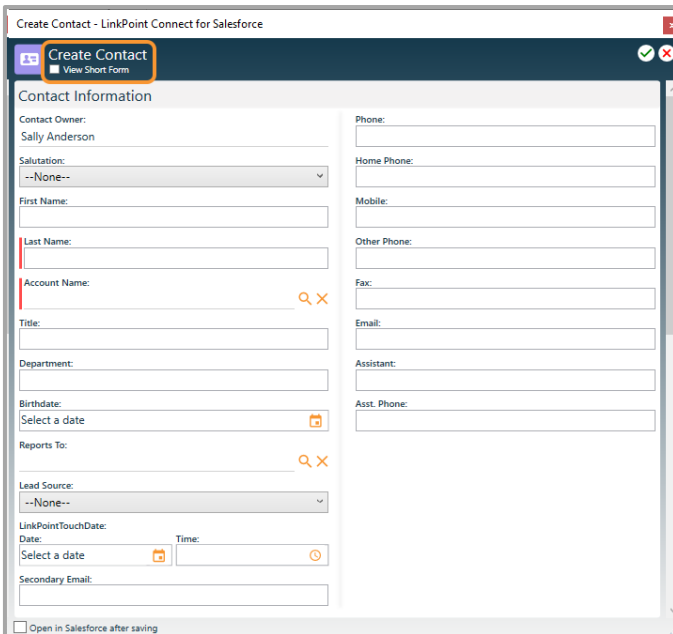
Preferences

Quick Find...




General Preferences


- ☐ Search only Salesforce 'name' fields.
- ☒ Display success messages when relating Salesforce records.
- ☒ Allow me to create follow ups when I related emails to Salesforce.
 - ☒ Follow up with Tasks
 - ☐ Follow up with Events
- ☐ Auto select all email attachments. Except those containing these words (one word per line)
- ☐ Do not search for the following email addresses or domains. 
- ☒ Show all record fields in the search result list.
- ☐ Show all record fields in the selections list.
- ☐ Double-click to relate/unrelate records.
- ☐ Rediscover Salesforce environment when I close this preferences panel.

- 8 Open a new **SnapForm** for the Object with the newly created Short Form criteria. Note that the option to **View Short Form** is now available.



Create Contact - LinkPoint Connect for Salesforce

Create Contact   

 View Short Form



Contact Information

Contact Owner: Sally Anderson

Salutation: --None--


First Name:



Last Name:

Account Name:  



Title:

Department:

Birthdate: 

Reports To:  

Lead Source: --None--

LinkPointTouchDate: Date:  Time: 

Secondary Email:

☐ Open in Salesforce after saving

Phone:

Home Phone:

Mobile:

Other Phone:

Fax:

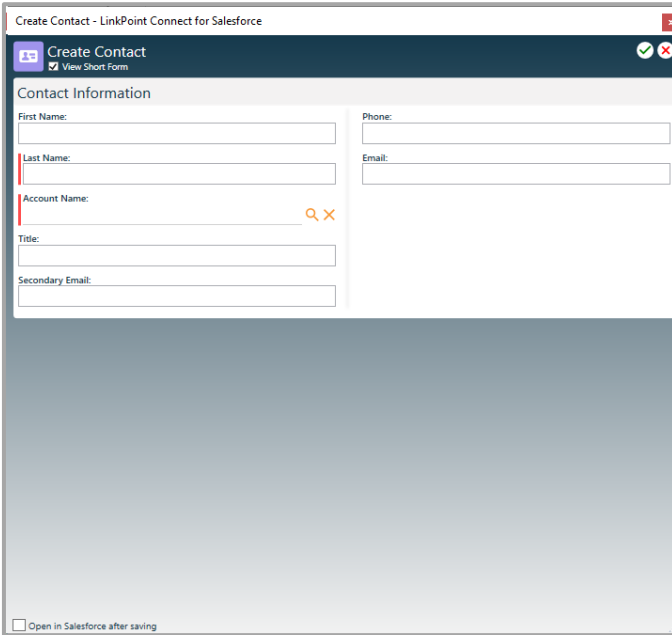
Email:

Assistant:

Asst. Phone:

9

Select the **View Short Form** checkbox to display the Short Form version of the SnapForm. The fields mirror those selected and organized when creating the Salesforce View. Deselect the View Short Form checkbox to view the complete SnapForm.




Create Contact - LinkPoint Connect for Salesforce

Create Contact
☒ View Short Form

Contact Information

First Name:

Last Name:

Account Name: 

Phone:

Email:

Title:

Secondary Email:

☐ Open in Salesforce after saving

Sync Calendar Events

Choose a Calendar Sync Mode

Work with calendar events in either Outlook or Salesforce and seamlessly sync items to the opposing system with a variety of calendar sync options. Users can leverage one of several sync modes: SnapRecord, manual sync, or auto sync. These modes cannot be used at the same time. Each mode provides a different level of control over how calendar events sync and require different levels of user interaction for the sync to occur. Review the available options to choose the calendar sync mode that best fits specific workflow needs. Review how to enable and interact with the sync mode in greater detail in the provided articles.

SnapRecord

Record specific calendar events from Outlook to Salesforce as a one-off action with SnapRecord. SnapRecord includes a one-way, single-click method to add an event to a Salesforce calendar. Calendar events added to Salesforce with SnapRecord are automatically updated if the user makes changes to the calendar event in Outlook. However, changes made to the calendar event in Salesforce will not be reflected in Outlook. Users can relate calendar events to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable. This option is enabled by default. SnapRecord is automatically disabled if Auto Sync is turned on.

Recommended for users who want a simple introduction to calendar sync and users who want selective control when working with calendar events.



Additional Resources: Refer to the [Record Events with SnapRecord](#) section of this User Guide for more information.

Manual Sync

Control when and how calendar events sync between Outlook and Salesforce with manual sync. Users leverage sync settings in LinkPoint Assist but must take action to run each sync. Users are prompted to review all calendar events considered for the sync and are given the option to include or exclude calendar events before the sync runs. Manual sync is disabled by default and can be configured one-way or bidirectionally between systems. Users can relate the item to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable.

Recommended for users who want to sync calendar events in bulk with the ability to double check how the sync rules affect calendars before data moves between systems. LinkPoint360 recommends first-time users run a manual sync before enabling auto sync. This offers users the opportunity to review the sync results before they take effect.



Additional Resources: Refer to the [Configure and Run a Manual Sync](#) section of this User Guide for more information.

Auto Sync

Preset calendar event sync to run automatically based on established rules. Users leverage sync settings in LinkPoint Assist indicating the range, frequency, and direction (one-way or bidirectional). The sync options automate when and how calendar events move between systems. Enabling auto sync disables the SnapRecord mode. Users can relate calendar events to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable.

Recommended for users who want to set calendar event sync based on sync preferences with little to no monitoring.



Additional Resources: Refer to the [Establish Calendar Auto Sync Settings](#) and [Relate Calendar Events to Salesforce with Auto Sync](#) sections of this User Guide for more information.

Record Events with SnapRecord

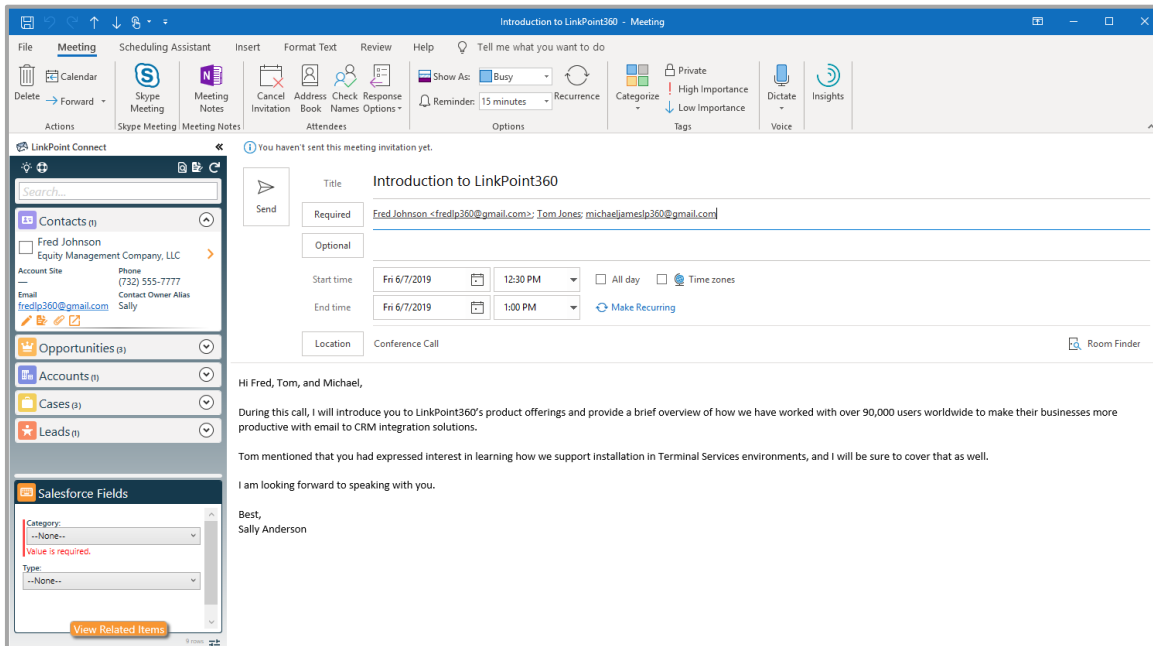
Record specific calendar events from Outlook to Salesforce as a one-off action. SnapRecord includes a one-way, single-click method to add an event to a Salesforce calendar. Calendar events added to Salesforce with SnapRecord are automatically updated if the user makes changes to the calendar event in Outlook. However, changes made to the calendar event in Salesforce will not be reflected in Outlook. Users can relate the calendar event to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable. This option is enabled by default. SnapRecord is automatically disabled if auto sync is turned on.



Warning: SnapRecord is automatically disabled if auto sync is turned on. Calendar events added to Salesforce with SnapRecord are updated one way, from Salesforce to Outlook. Changes to the calendar events in Salesforce will not be reflected in Outlook.

1

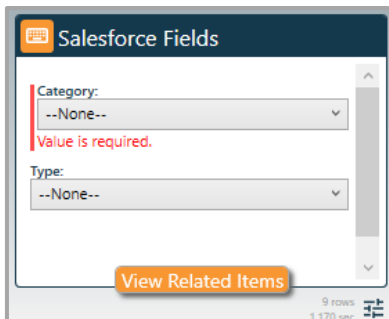
Create or open a **Meeting** or **Appointment** in Outlook, and enter information for the item including the invitees, subject, location, date, time, and content as needed.



Tip: If a Meeting is addressed to at least one recipient, the Side Panel will automatically search Salesforce for matching records. For Appointments, users can search the Side Panel for Salesforce records.

2

Review the SnapFields in the **Salesforce Fields** section of the Side Panel. Enter the values as applicable, noting that required fields are marked in red. These fields will be updated in Salesforce when the event is recorded.

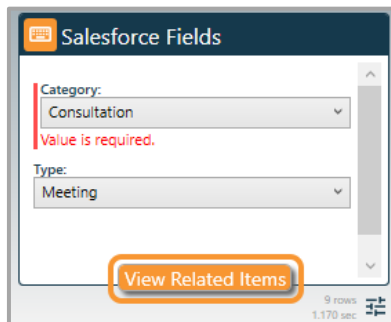




Tip: SnapFields appear in the Side Panel if the Salesforce event page layout includes either the type field and/or any custom required fields. Users cannot SnapRecord the event until required fields are completed. Some users may not have any SnapFields available.

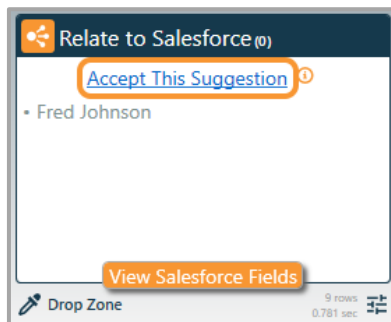
3

Select the option to **View Related Items** to hide the SnapFields and to view options for recording the event to Salesforce.



4

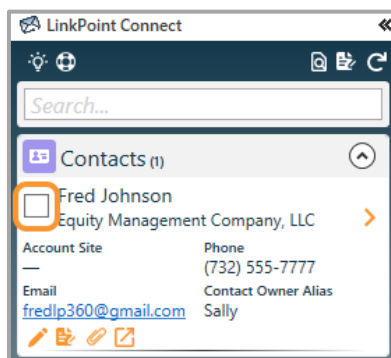
Select the option to **Accept This/These Suggestions** in the **Relate to Salesforce** section to record the calendar event to all of the suggested records.



Tip: LinkPoint Connect automatically suggests contacts and leads that exist in Salesforce if they are included in the Required or Optional fields of the meeting. If there are no matching contacts or leads in Salesforce, the Relate to Salesforce section will not display any suggestions.

5

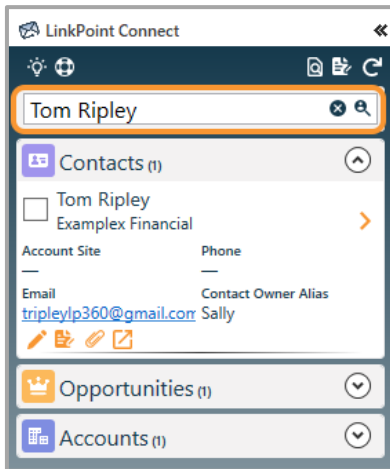
Select the **Relate to Salesforce** checkbox next to records in the Search Results to record the calendar event to the selected record.



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 calendar event.

6

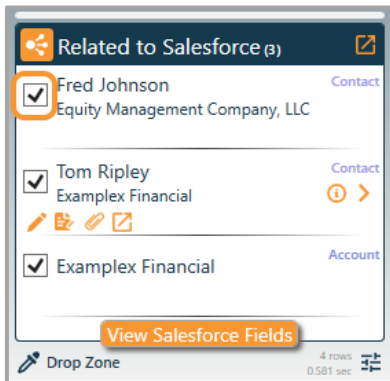
Enter text in the **Search** field, and press **Enter** or click the Search icon to find for additional records.



Additional Resources: Users can adjust the Salesforce objects and fields included in the Search Results in the Preferences Pane. Refer to the [Edit Preferences](#) section of this User Guide for more information.

7

Deselect the **Relate to Salesforce** checkbox to disassociate the calendar event from a selected record. Uncheck all of the selections to remove the calendar event from Salesforce.



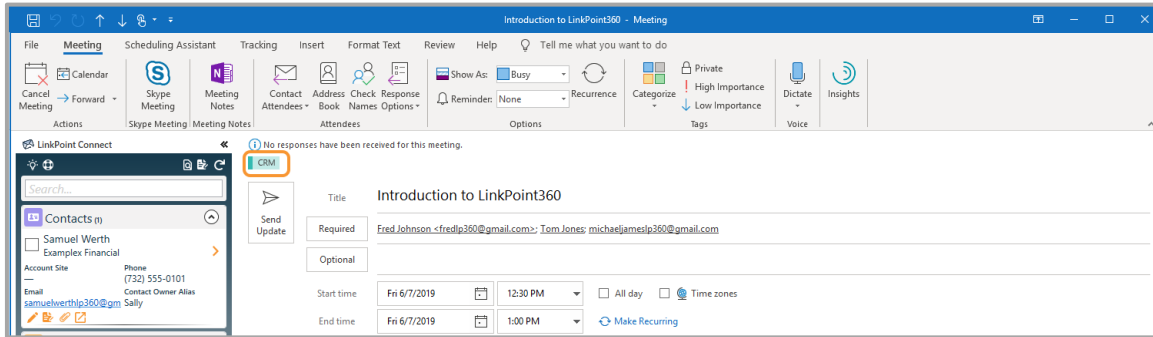
Tip: Some SnapShots may not include a checkbox to relate the calendar event to a Salesforce record. The option to Relate to Salesforce only appears when working with a supported Outlook item (i.e. email, calendar event, or task). The checkbox will not appear if the Salesforce record does not include Activity History.

8

Send or save a new calendar event to record it to the selected Salesforce records. Existing calendar events will be recorded in real time when Relate to Salesforce selections are made.



Tip: An Outlook Category of **CRM** will be assigned automatically to the calendar event after it has been recorded to Salesforce, providing a visual indicator of recorded items in Outlook.



Establish Calendar Auto Sync Settings

Preset calendar event sync to run automatically based on established rules. Users leverage sync settings in LinkPoint Assist to indicate the range, frequency, and direction (one-way or bidirectional). The sync options automate when and how calendar events move between systems. Enabling auto sync disables the SnapRecord mode. Users can relate calendar events to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable. By default, all items on both the Outlook and Salesforce calendars will be compared and synced, excluding private items, based on the specified sync settings for date range. Items one month prior and 365 days in the future will sync by default.



Warning: LinkPoint360 recommends first-time users run a manual sync before enabling auto sync. This offers users the opportunity to review the sync results before they take effect. Refer to the [Configure and Run a Manual Sync](#) section of this User Guide for more information.



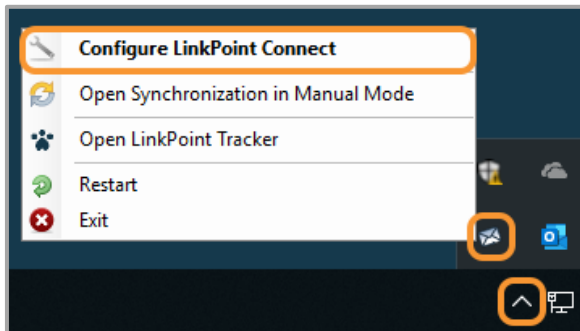
Tip: LinkPoint Connect will only sync one-to-one between a single Outlook calendar and Salesforce. This means that while users may have access to more than one Outlook calendar (i.e. personal calendar, a team or group calendar), users can only choose one calendar to sync with Salesforce. Note that if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



Tip: Users can choose to only sync calendar events that are related to Salesforce records via the Side Panel. Contact a LinkPoint360 Account Executive for more information.

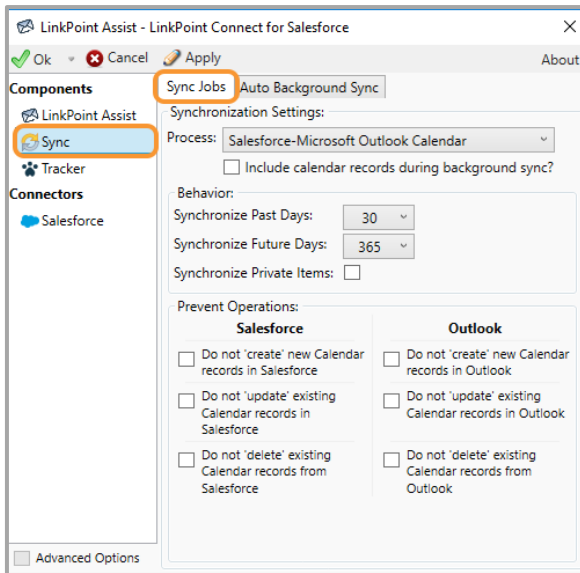
1

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



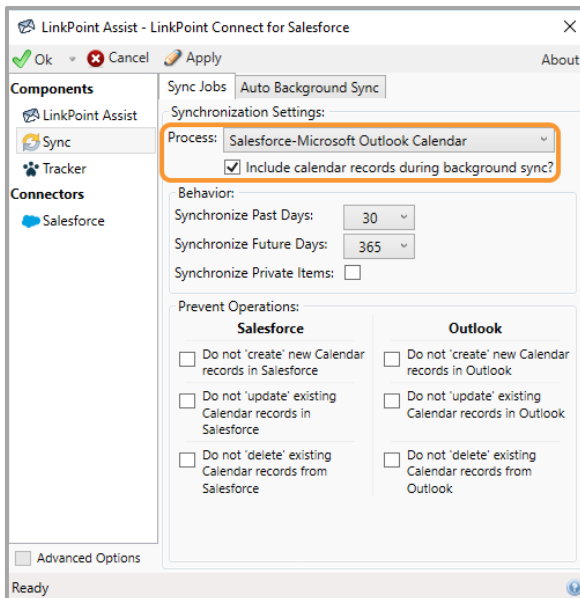
2

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

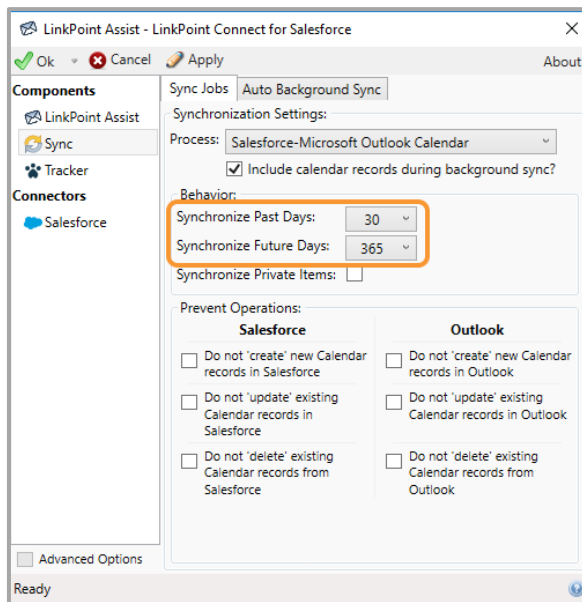


3

Select **Salesforce-Microsoft Outlook Calendar** from the **Process** drop-down list. Then click the checkbox for **Include calendar records during background sync?**



- 4 Select the number of days from the **Synchronize Past Days** and **Synchronize Future Days** drop-down lists. This will determine how many past and future calendar days to include in the sync.



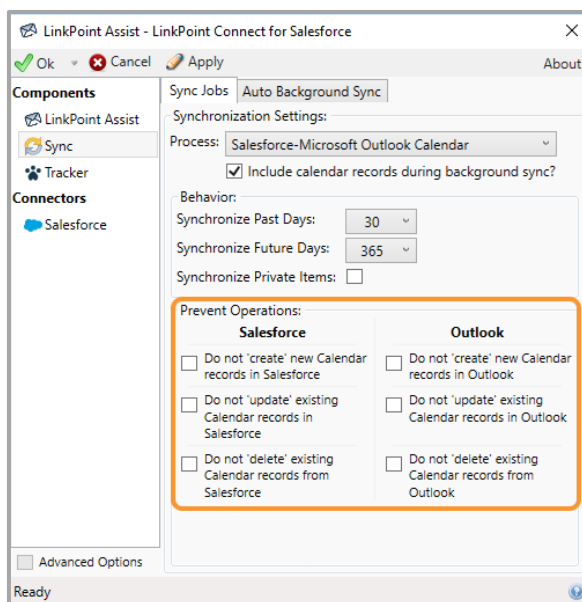
Tip: The default values are 30 past days and 365 future days. Note that calendar events that fall outside of the specified sync range will no longer sync.



Tip: By default, private calendar events will not sync. Users should mark calendar events as private in Outlook and/or Salesforce prior to enabling the sync.

5

- Select the options in the **Prevent Operations** section based on workflow need.

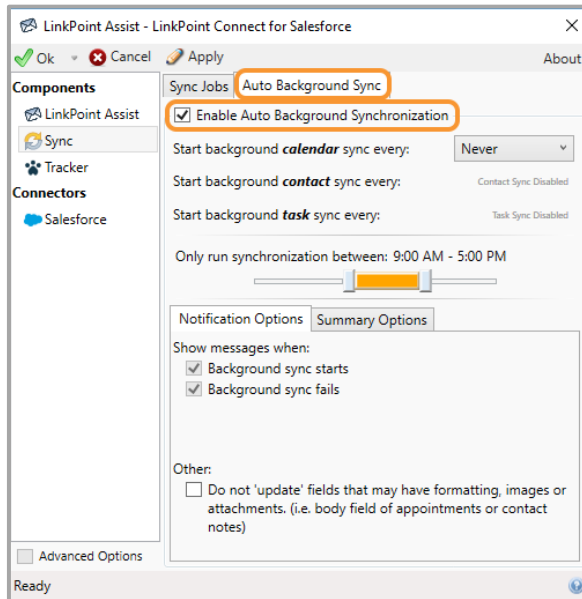




Tip: Users can prevent LinkPoint Connect from creating, updating, or deleting items regardless of any other system settings. Users can set this individually for Outlook and Salesforce, effectively creating bidirectional or one-way sync rules.

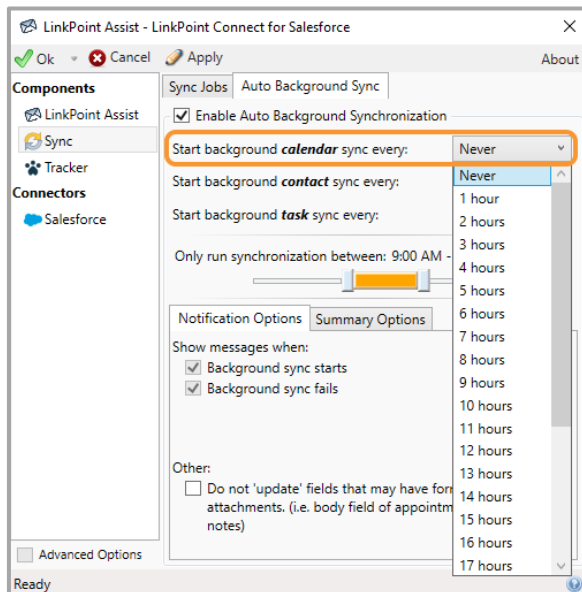
6

Select the **Auto Background Sync** tab, and click the **Enable Auto Background Synchronization** checkbox.



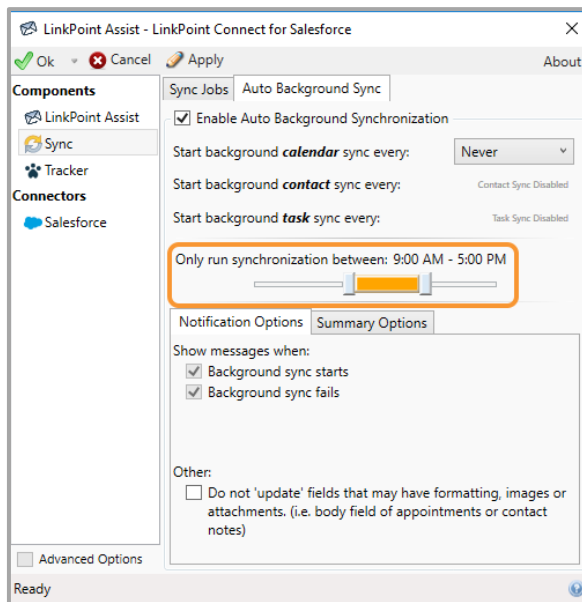
7

Select the frequency from the **Start background calendar sync every** drop-down list.



8

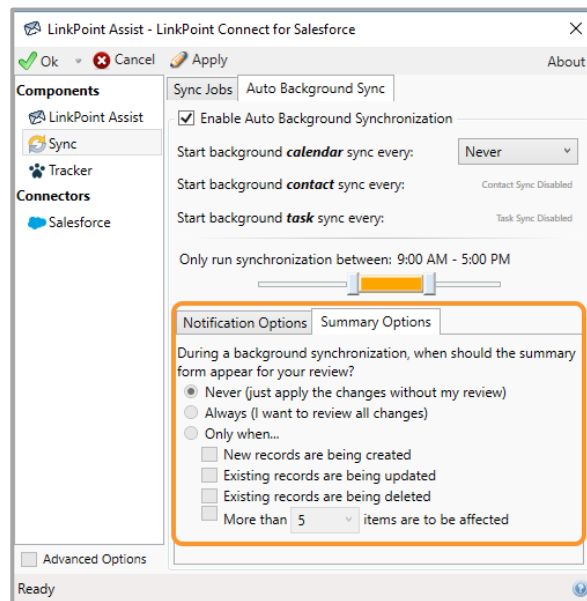
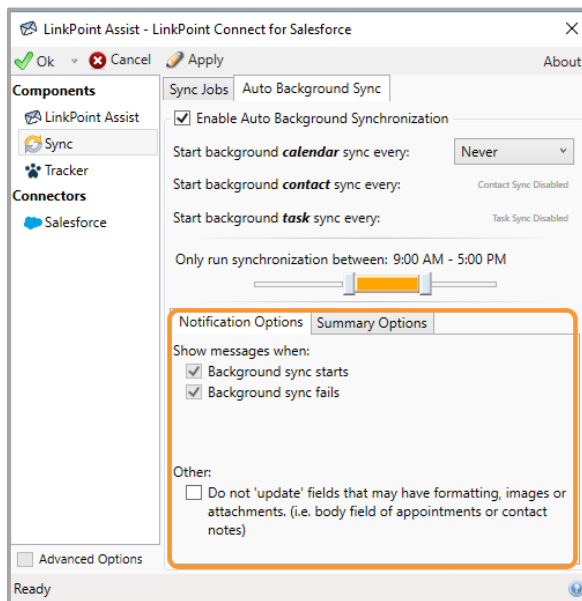
Select the time frame during which the auto sync should run by sliding the selectors to the left or right to adjust the range.



Tip: 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 user's computer is located. Calendar events are stored in Salesforce in GMT and then adjusted automatically for each user.

9

Review the settings in the **Notification Options** and **Summary Options** tabs. Select or deselect the checkboxes as needed to adjust how sync notifications and messaging are displayed.

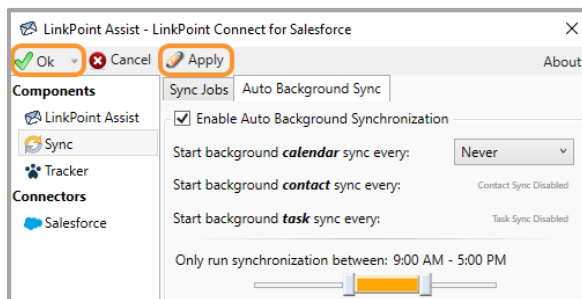




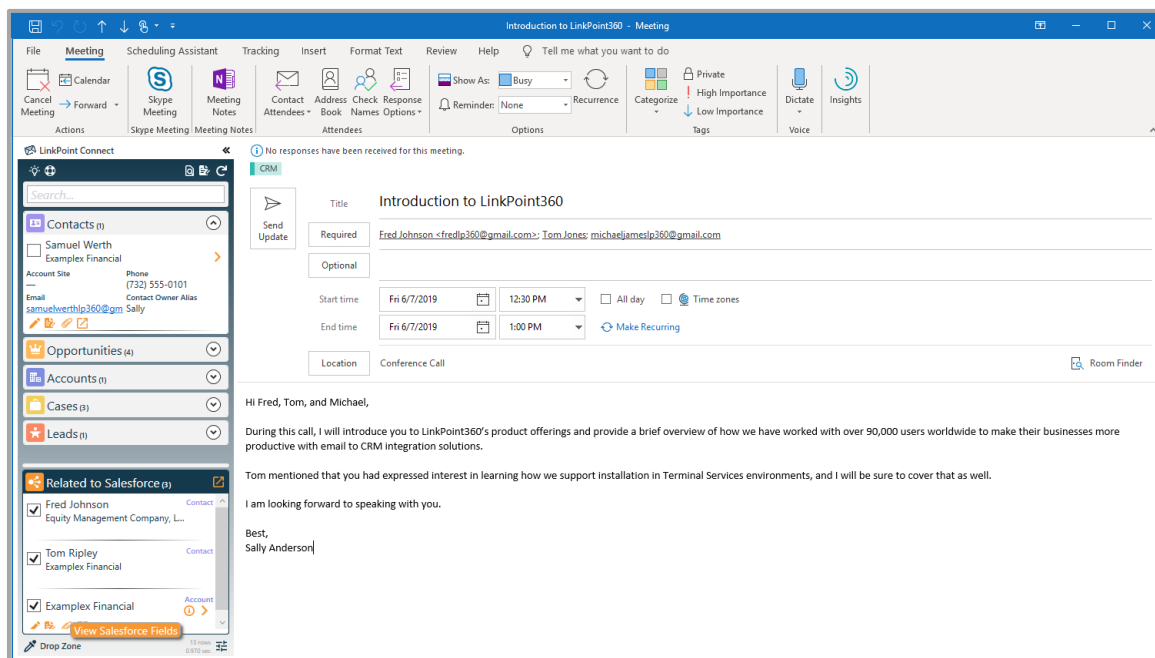
Tip: For example, a user may have a calendar event in Outlook that contains special formatting (such as unique fonts or colors). When the calendar event syncs to Salesforce, the original calendar event retains its formatting in Outlook, but the copy in Salesforce loses the formatting due to Salesforce limitations. If the user makes a change in Salesforce, LinkPoint Connect may try to sync the most updated version back to Outlook, depending on user settings. Selecting the option to **Do not 'update' fields that may have formatting, images or attachments** will prevent the original body content in Outlook from being overwritten, thus preserving the formatting. Other details, such as meeting date or time, will still update if necessary.

10

Click the **Apply** button when finished to finalize the settings. Click **Ok** to close LinkPoint Assist. LinkPoint Connect will sync the calendar events at the scheduled interval based on the sync rules.



Tip: Users can also relate calendar events to Salesforce records and update event fields from the Side Panel in Outlook. Users do not need to relate the calendar event to a Salesforce record for it to sync with auto sync enabled.



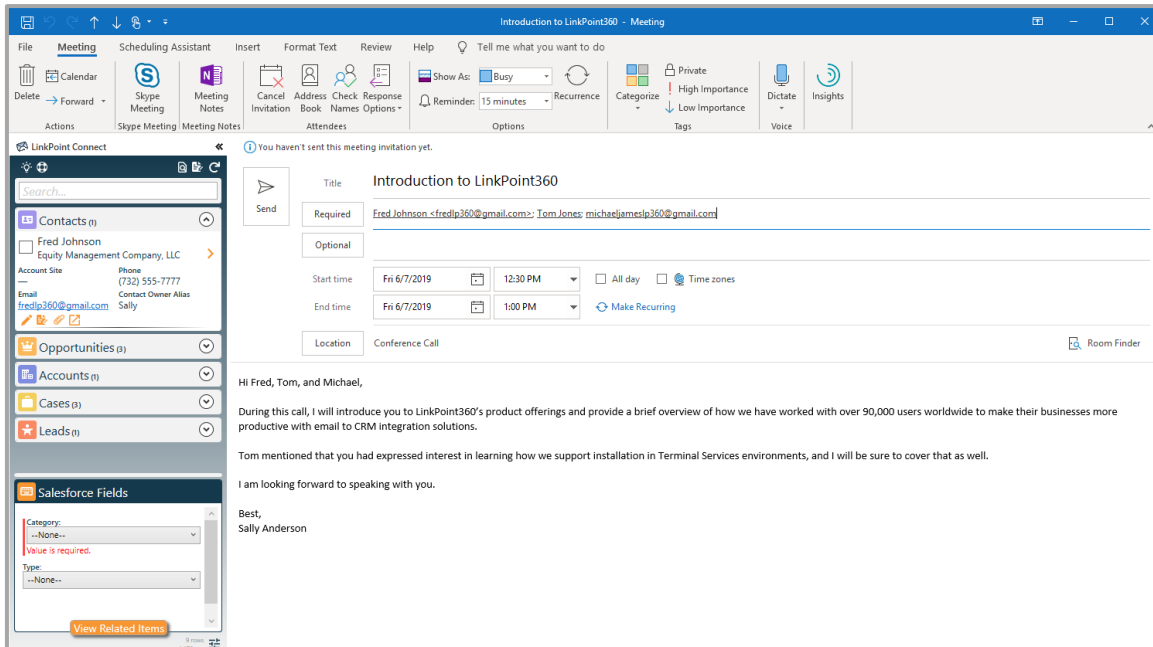
Additional Resources: Refer to the [Relate Calendar Events to Salesforce with Auto Sync](#) section of this User Guide for more information.

Relate Calendar Events to Salesforce with Auto Sync

Enabling auto sync for calendar events will automatically move calendar events between Outlook and Salesforce based on the established sync settings. Users do not need to relate calendar events to Salesforce records for the auto sync to run. However, relating calendar events to Salesforce records provides additional insight regarding a user's schedule and enhances Salesforce reporting. Users can relate calendar events to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable.

1

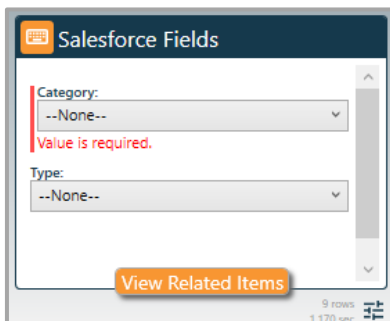
Create or open a **Meeting** or **Appointment** in Outlook, and enter information for the item including the invitees, subject, location, date, time, and content as needed.



Tip: If a Meeting is addressed to at least one recipient, the Side Panel will automatically search Salesforce for matching records. For Appointments, users can search the Side Panel for Salesforce records.

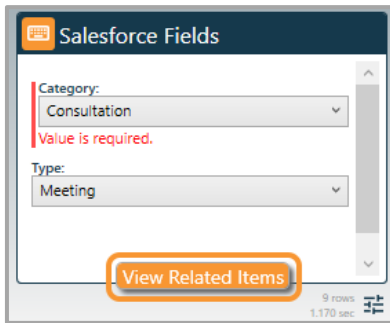
2

Review the SnapFields in the **Salesforce Fields** section of the Side Panel. Enter the values as applicable, noting that required fields are marked in red. These fields will be updated in Salesforce when the event is recorded.

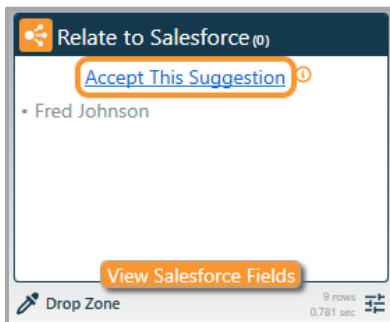


Tip: SnapFields appear in the Side Panel if the Salesforce event page layout includes either the type field and/or any custom required fields. Users cannot SnapRecord the event until required fields are completed. Some users may not have any SnapFields available.

- 3 Select the option to **View Related Items** to hide the SnapFields and to view options for recording the event to Salesforce.

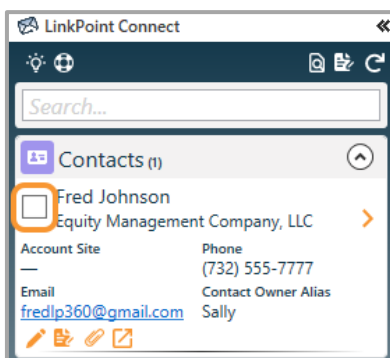


- 4 Select the option to **Accept This/These Suggestions** in the **Relate to Salesforce** section to record the calendar event to all of the suggested records.



Tip: LinkPoint Connect automatically suggests contacts and leads that exist in Salesforce if they are included in the Required or Optional fields of the meeting. If there are no matching contacts or leads in Salesforce, the Relate to Salesforce section will not display any suggestions.

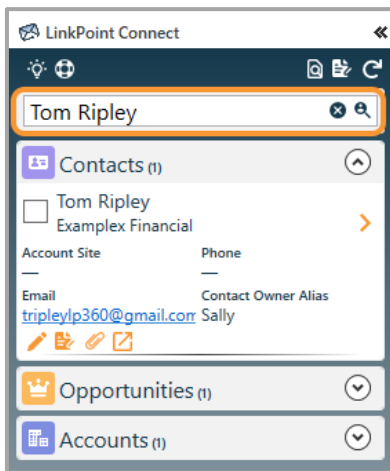
- 5 Select the **Relate to Salesforce** checkbox next to records in the Search Results to relate the calendar event to the selected record.



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 calendar event.

6

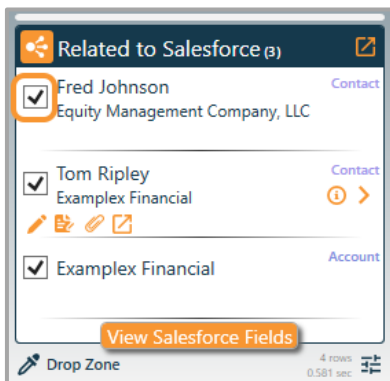
Enter text in the **Search** field, and press **Enter** or click the Search icon to find additional records.



Additional Resources: Users can adjust the Salesforce objects and fields included in the Search Results in the Preferences Pane. Refer to the [Edit Preferences](#) section of this User Guide for more information.

7

Deselect the **Relate to Salesforce** checkbox to disassociate the calendar event from a selected record.



Tip: Some SnapShots may not include a checkbox to relate the calendar event to a Salesforce record. The option to Relate to Salesforce only appears when working with a supported Outlook item (i.e. email, calendar event, or task). The checkbox will not appear if the Salesforce record does not include Activity History.

8

Send or save the calendar event. The calendar event will sync based on the established auto sync settings. The calendar event will appear on the user's calendar in Salesforce and will be related to the selected records, with fields updated, as applicable.

Sync Contacts

Choose a Contact Sync Mode

Work with contacts in either Outlook or Salesforce and seamlessly sync contacts to the opposing system with a variety of sync options. Users can leverage one of several sync modes: manual sync or auto sync. Each mode provides a different level of control over how contacts sync and require different levels of user interaction for the sync to occur. Review the available options to choose the contact sync mode that best fits specific workflow needs. Users can then review how to enable and interact with the sync mode in greater detail in the provided articles.

Manual Sync

Control when and how contacts sync between Outlook and Salesforce with manual sync. Users leverage sync settings in LinkPoint Assist but must take action to run each sync. Users are prompted to review all contacts that will be considered for the sync and are given the option to include or exclude contacts before the sync runs. Manual sync is disabled by default and can be configured one-way or bidirectionally between systems.

Recommended for users who want to sync contacts in bulk but with the ability to double check how the sync rules affect contacts before data moves between systems. LinkPoint360 recommends first-time users run a manual sync before enabling auto sync. This offers users the opportunity to review the sync results before they take effect.



Additional Resources: Refer to the [Configure and Run a Manual Sync](#) section of this User Guide for more information.

Auto Sync

Preset contact sync to run automatically based on established rules. Users leverage sync settings in LinkPoint Assist indicating the range, frequency, and direction (one-way or bidirectional). The sync options automate when and how contacts move between systems.

Recommended for users who want to set contacts sync based on sync preferences with little to no monitoring.



Additional Resources: Refer to the [Establish Contact Auto Sync Settings](#) sections of this User Guide for more information.

Establish Contact Auto Sync Settings

Preset contact sync to run automatically based on established rules. Users leverage sync settings in LinkPoint Assist to indicate the range, frequency, and direction (one-way or bidirectional). The sync options automate when and how contacts move between systems. By default, all contacts in Outlook and all contacts that a user owns in Salesforce will be compared and synced to the standard Contacts folder in Outlook. The option to delete contacts from Salesforce is disabled by default to protect data from errant deletion.



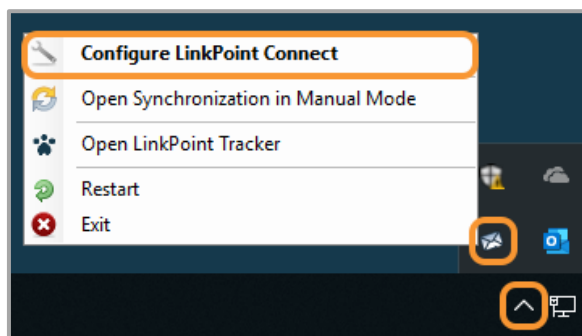
Tip: Users can leverage the Side Panel to search and view Salesforce data when working with contacts in Outlook. Currently, contacts cannot be related to additional Salesforce records from Outlook. Outlook contacts that sync to Salesforce will be created in the CRM as private contacts. Users will need to locate these contacts and relate them to Salesforce accounts or other records, as applicable.



Warning: LinkPoint360 recommends first-time users run a manual sync before enabling auto sync. This offers users the opportunity to review the sync results before they take effect. Refer to the [Configure and Run a Manual Sync](#) section of this User Guide for more information.

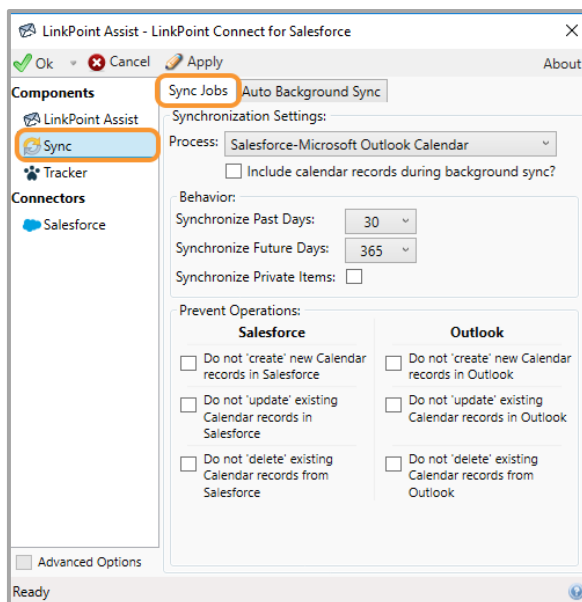
1

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

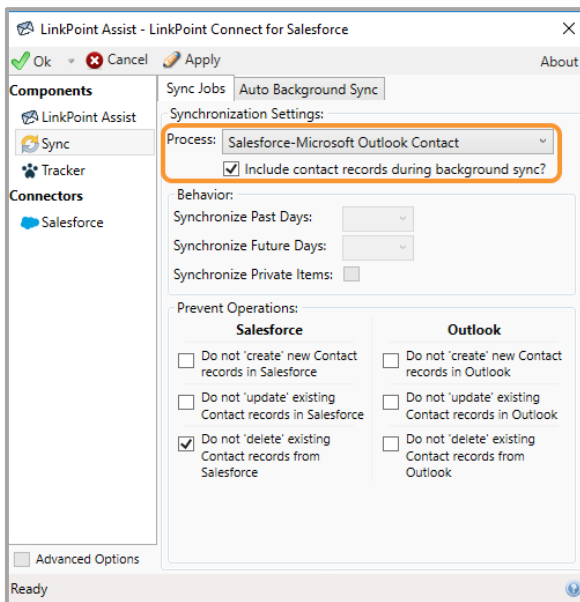


2

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

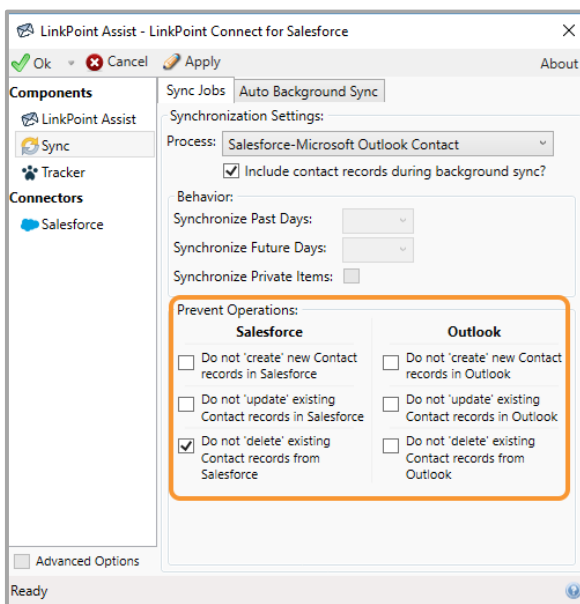


- 3 Select **Salesforce-Microsoft Outlook Contact** from the **Process** drop-down list. Then click the checkbox for **Include contact records during background sync?**



Tip: By default, users will sync contacts that they own in Salesforce with the standard Outlook Contacts folder. Users can choose to sync all contacts, contacts on a team, or contacts on a specific campaign. Users can also specify a different folder in Outlook for contact sync. Contact a LinkPoint360 Account Executive for more information on changing these configuration settings.

- 4 Select the options in the **Prevent Operations** section based on workflow need.



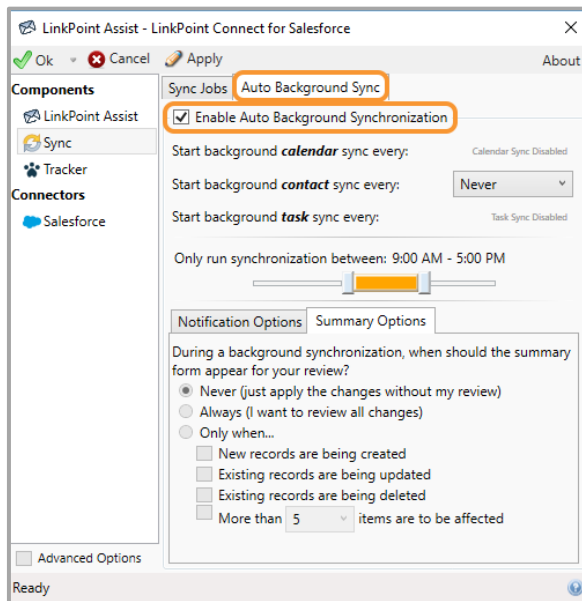
Tip: Users can prevent LinkPoint Connect from creating, updating, or deleting items regardless of any other system settings. Users can set this individually for Outlook and Salesforce, effectively creating bidirectional or one-way sync rules.



Tip: For contact sync, 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 Salesforce. Users can deselect the checkbox to override this setting.

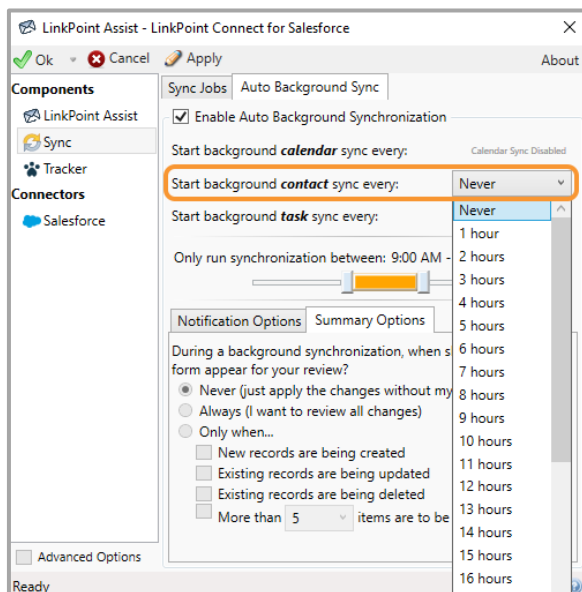
5

Select the **Auto Background Sync** tab, and click the **Enable Auto Background Synchronization** checkbox.



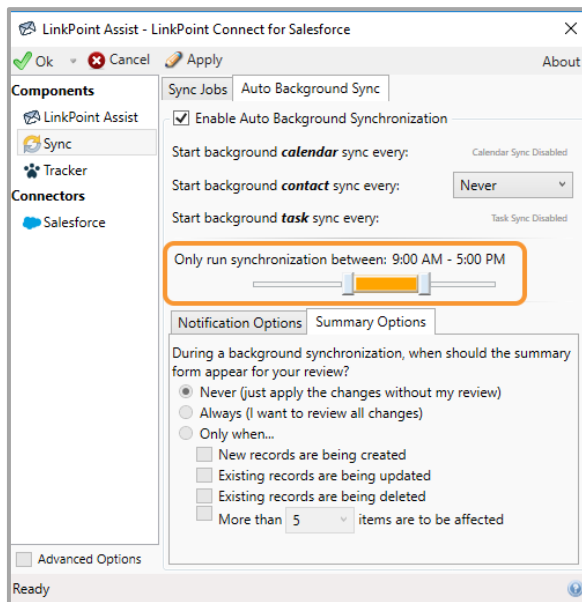
6

Select the frequency from the **Start background contact sync every** drop-down list.



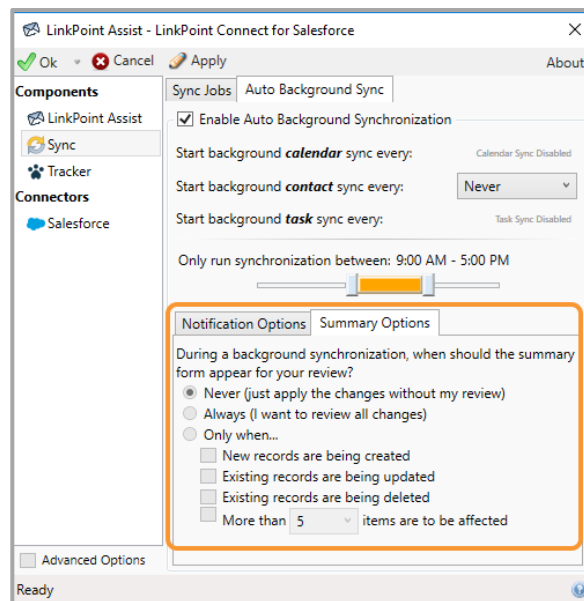
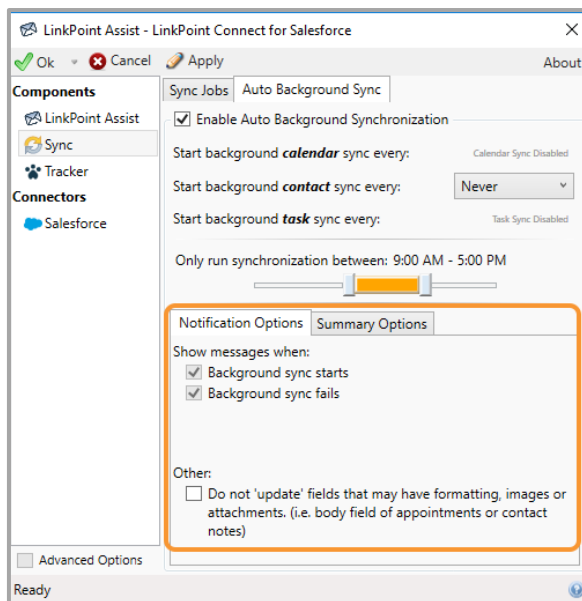
7

Select the time frame during which the auto sync should run by sliding the selectors to the left or right to adjust the range.



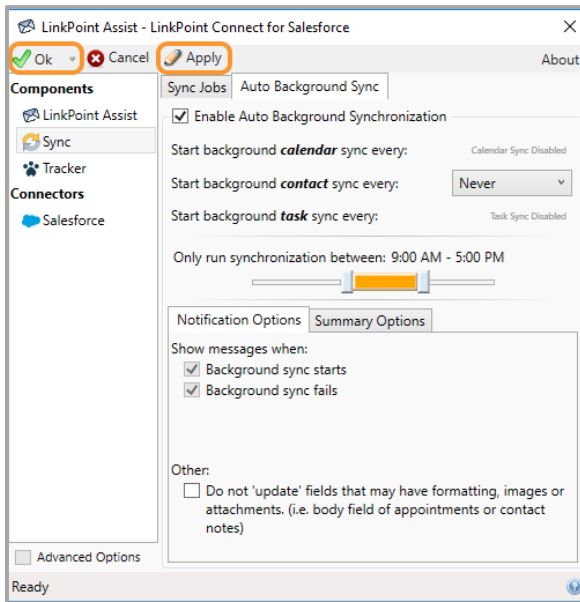
8

Review the settings in the **Notification Options** and **Summary Options** tabs. Select or deselect the checkboxes as needed to adjust how sync notifications and messaging are displayed.



9

Click the **Apply** button when finished to finalize the settings. Click **Ok** to close LinkPoint Assist. LinkPoint Connect will sync the contacts at the scheduled interval based on the sync rules.



Sync Contacts with Different Filters

Sync contacts based on a number of different filters. Many organizations choose to further refine how contacts sync between systems based on the contact owner(s) and assignment in Salesforce. Available filters include:

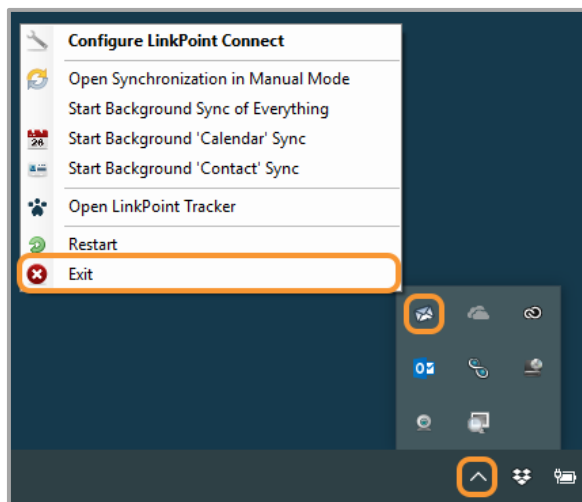
- **Own:** Sync only the contacts that the current user owns in Salesforce plus any contacts assigned to a private "ContactSync" campaign. LinkPoint Connect is configured this way by default (value: own)
- **Team:** Sync only the contacts that the current user owns in Salesforce plus any contacts assigned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



Tip: To use the Campaign filter, users can assign contacts to a **ContactSync** campaign. The campaign must be created once for each user and named **ContactSync**. After assigning contacts to the ContactSync campaign, users must change the value in the LinkPoint Connect configuration file to reflect desired option.

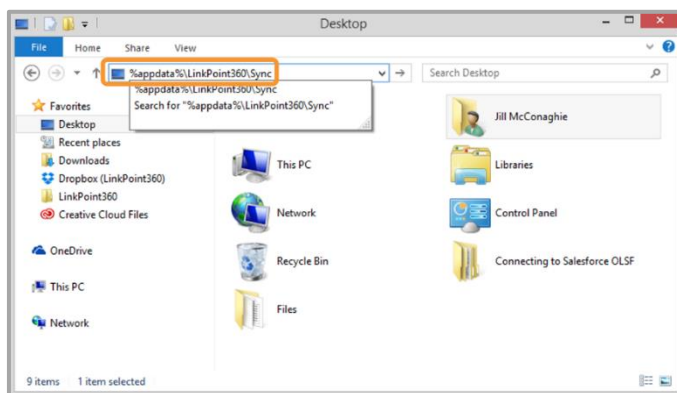
1

Close both **Outlook** and **LinkPoint Assist** via the icon in the system tray.



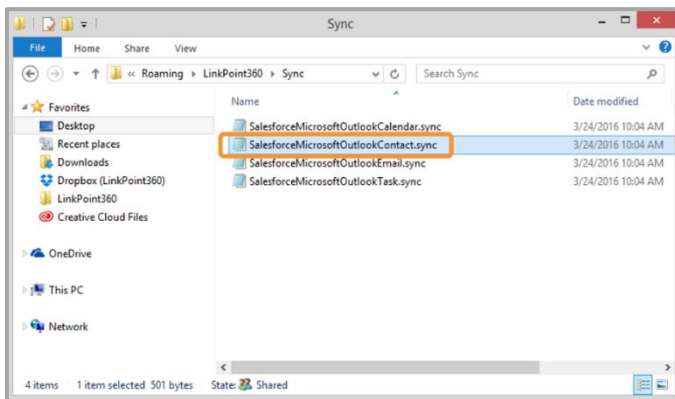
2

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



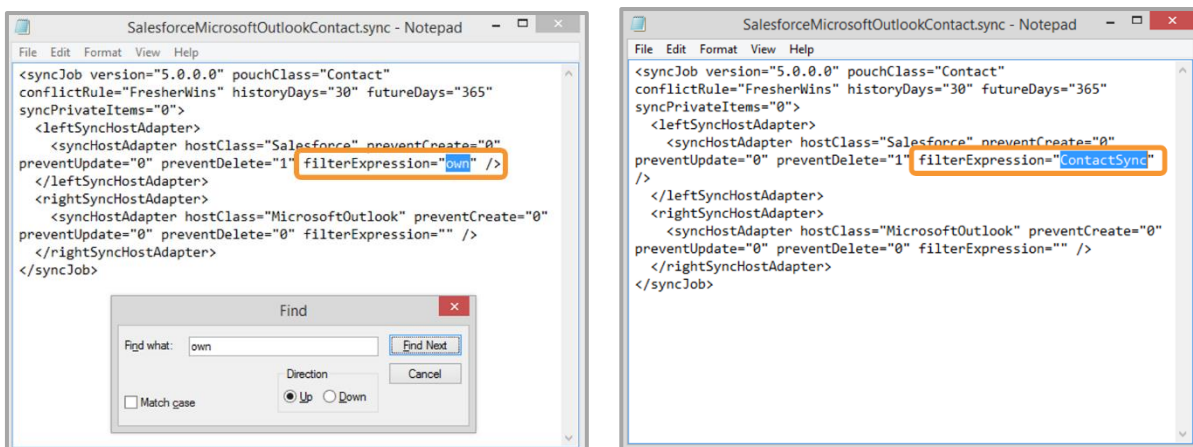
3

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



4

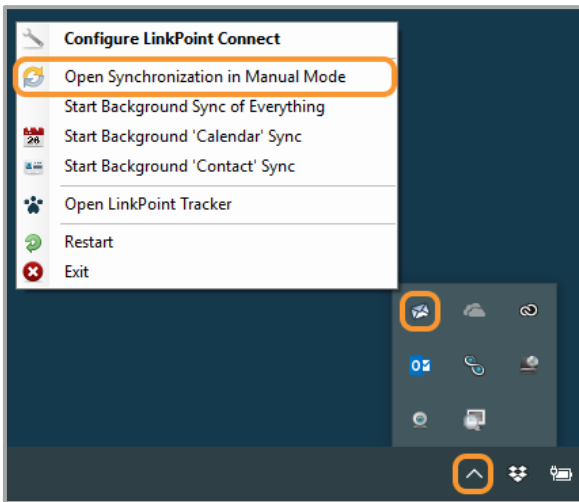
Search for the phrase **filterExpression="own"**, and replace the word **own** with the filter keyword to use instead.



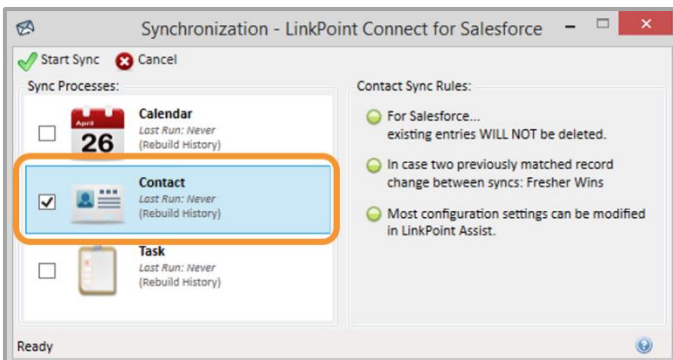
5

Save the file once the changes are complete. Then open **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.



Sync Tasks

Choose a Task Sync Mode

Work with tasks in either Outlook or Salesforce and seamlessly sync items to the opposing system with a variety of task sync options. Users can leverage one of several sync modes: SnapRecord, manual sync, or auto sync. These modes cannot be used at the same time. Each mode provides a different level of control over how tasks sync and require different levels of user interaction for the sync to occur. Review the available options to choose the task sync mode that best fits specific workflow needs. Review how to enable and interact with the sync mode in greater detail in the provided articles.

SnapRecord

Record specific tasks from Outlook to Salesforce as a one-off action with SnapRecord. SnapRecord includes a one-way, single-click method to add a task to Salesforce. Tasks added to Salesforce with SnapRecord are automatically updated if the user makes changes to the task in Outlook. However, changes made to the task in Salesforce will not be reflected in Outlook. Users can relate the task to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable. This option is enabled by default. SnapRecord is automatically disabled if auto sync is turned on.

Recommended for users who want a simple introduction to task sync and users who want selective control when working with tasks.



Additional Resources: Refer to the [Record Tasks with SnapRecord](#) section of this User Guide for more information.

Manual Sync

Control when and how tasks sync between Outlook and Salesforce with Manual sync. Users leverage sync settings in LinkPoint Assist but must take action to run each sync. Users are prompted to review all tasks considered for the sync and are given the option to include or exclude tasks before the sync runs. Manual sync is disabled by default and can be configured one-way or bidirectionally between systems. Users can relate tasks to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable.

Recommended for users who want to sync tasks in bulk with the ability to double check how the sync rules affect tasks before data moves between systems. LinkPoint360 recommends first-time users run a manual sync before enabling auto sync. This offers users the opportunity to review the sync results before they take effect.



Additional Resources: Refer to the [Configure and Run a Manual Sync](#) section of this User Guide for more information.

Auto Sync

Preset tasks sync to run automatically based on established rules. Users leverage sync settings in LinkPoint Assist indicating the range, frequency, and direction (one-way or bidirectional). The sync options automate when and how tasks move between systems. Enabling auto sync disables the SnapRecord mode. Users can relate tasks to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable.

Recommended for users who want to set tasks sync based on sync preferences with little to no monitoring.



Additional Resources: Refer to the [Establish Task Auto Sync Settings](#) and [Relate Tasks to Salesforce with Auto Sync](#) sections of this User Guide for more information.

Record Tasks with SnapRecord

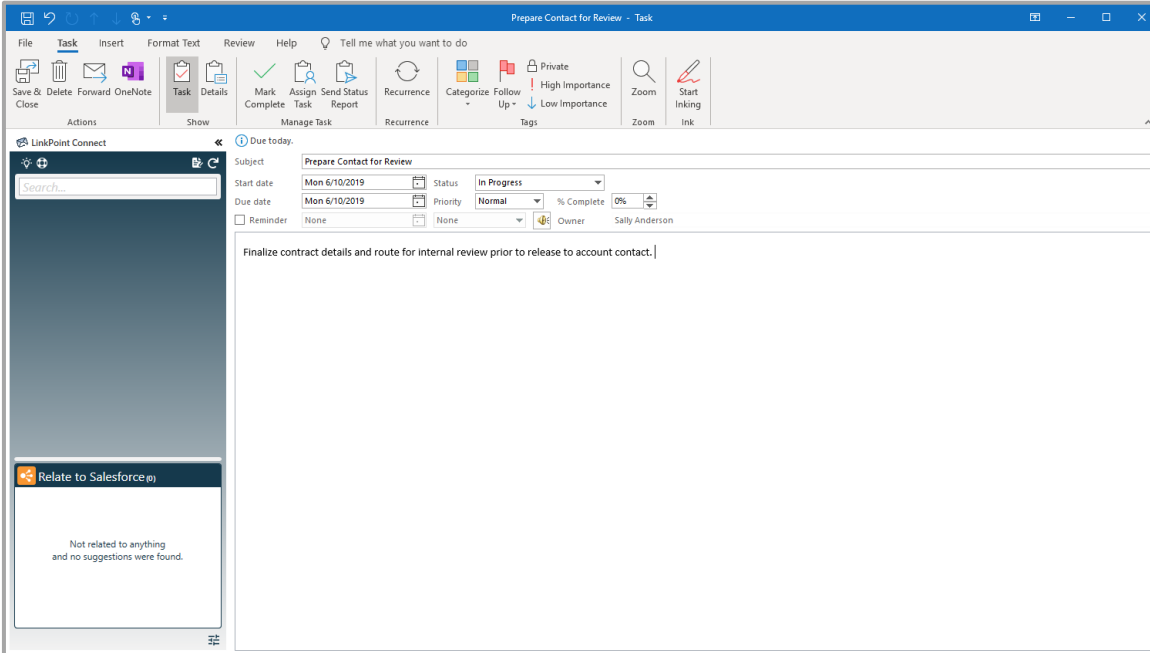
Record specific tasks from Outlook to Salesforce as a one-off action. SnapRecord includes a one-way, single-click method to add a task to Salesforce. Tasks added to Salesforce with SnapRecord are automatically updated if the user makes changes to the task in Outlook. However, changes made to the task in Salesforce will not be reflected in Outlook. Users can relate the task to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable. This option is enabled by default. SnapRecord is automatically disabled if auto sync is turned on.



Warning: SnapRecord is automatically disabled if auto sync is turned on. Tasks added to Salesforce with SnapRecord are updated one way from Salesforce to Outlook. Changes to the tasks in Salesforce will not be reflected in Outlook.

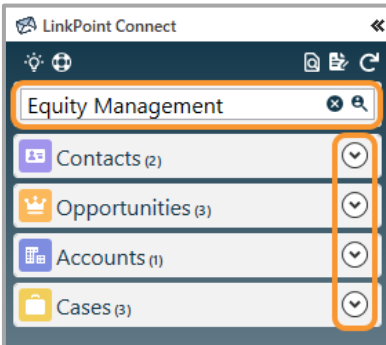
1

Create or open a **Task** in Outlook, and enter information for the item in the presented fields, as needed.

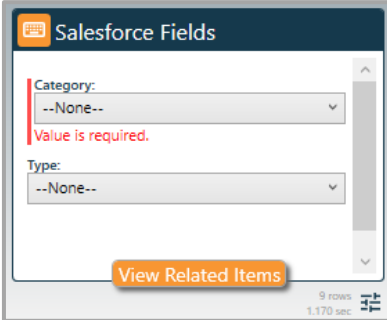


2

Search for relevant Salesforce records in the Side Panel. Click the **Expand** icon to view the list of available records for each object.

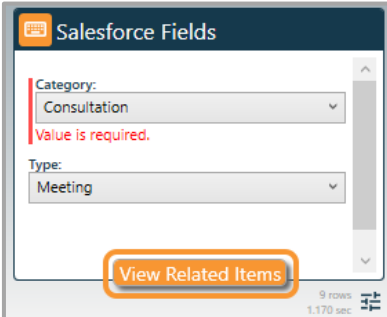


- 3 Review the SnapFields in the **Salesforce Fields** section of the Side Panel. Enter the values as applicable, noting that required fields are marked in red. These fields will be updated in Salesforce when the task is recorded.

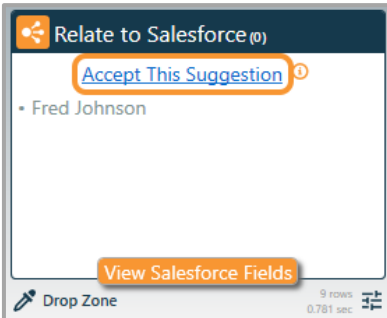


Tip: SnapFields appear in the Side Panel if the Salesforce task page layout includes either the type field and/or any custom required fields. Users cannot SnapRecord the task until required fields are completed. Some users may not have any SnapFields available.

- 4 Select the option to **View Related Items** to hide the SnapFields and to view options for recording the task to Salesforce.

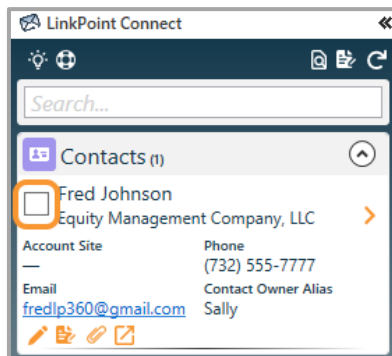


- 5 Select the option to **Accept This/These Suggestions** in the **Relate to Salesforce** section to record the task to all of the suggested records.



6

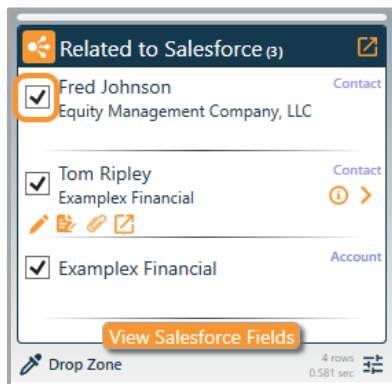
Select the **Relate to Salesforce** checkbox next to records in the Search Results to record the task to the selected record.



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 task.

7

Deselect the **Relate to Salesforce** checkbox to disassociate the task from a selected record. Uncheck all of the selections to remove the task from Salesforce.



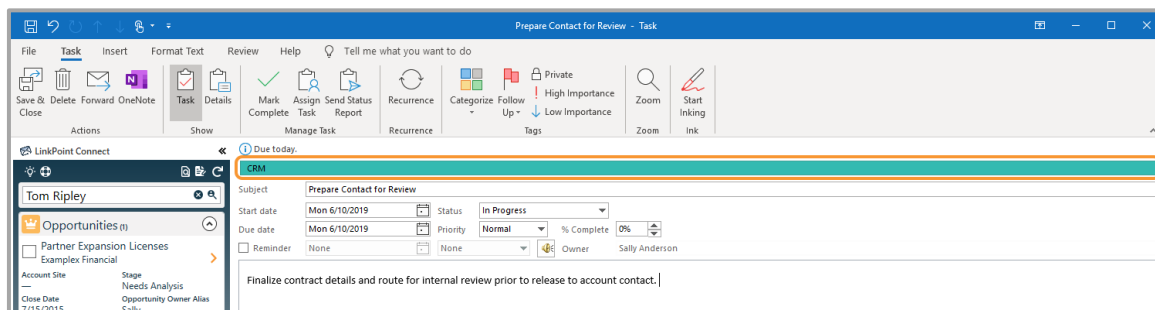
Tip: Some SnapShots may not include a checkbox to relate the task to a Salesforce record. The option to Relate to Salesforce only appears when working with a supported Outlook item (i.e. email, calendar event, or task). The checkbox will not appear if the Salesforce record does not include Activity History.

8

Save the task to record it to the selected Salesforce records in real time.



Tip: An Outlook Category of **CRM** will be assigned automatically to the task after it has been recorded to Salesforce, providing a visual indicator of recorded items in Outlook.



Establish Task Auto Sync Settings

Preset tasks sync to run automatically based on established rules. Users leverage sync settings in LinkPoint Assist, indicating the range, frequency, and direction (one-way or bidirectional). The sync options automate when and how tasks items move between systems. Enabling auto sync disables the SnapRecord mode. Users can relate the item to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable. By default, all task items in both the Outlook and Salesforce will be compared and synced, excluding private items, based on the specified sync settings for date range. Items one month prior and 365 days in the future will sync by default.



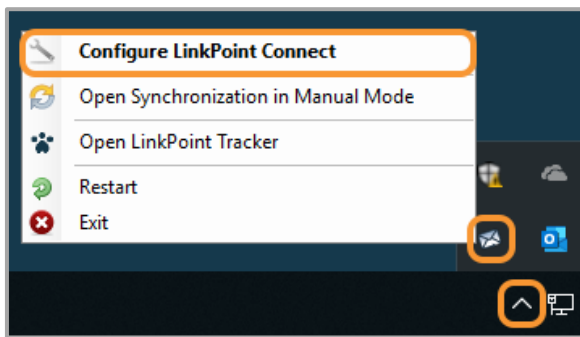
Warning: LinkPoint360 recommends first-time users run a manual sync before enabling auto sync. This offers users the opportunity to review the sync results before they take effect. Refer to the [Configure and Run a Manual Sync](#) section of this User Guide for more information.



Tip: Users can choose to only sync tasks that are related to Salesforce records via the Side Panel. Contact a LinkPoint360 Account Executive for more information.

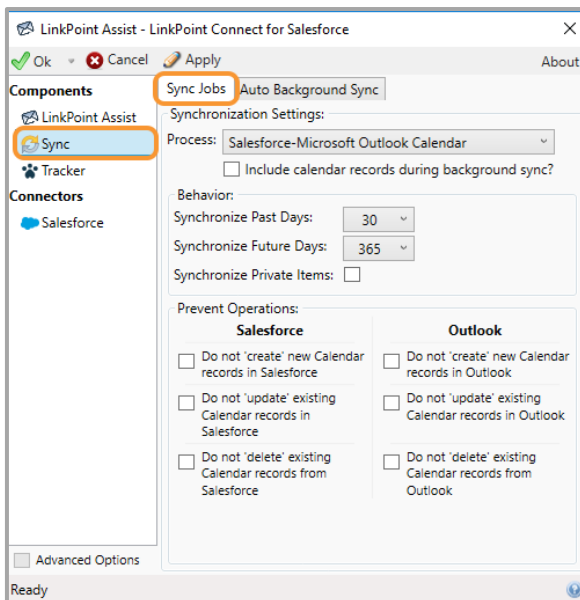
1

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



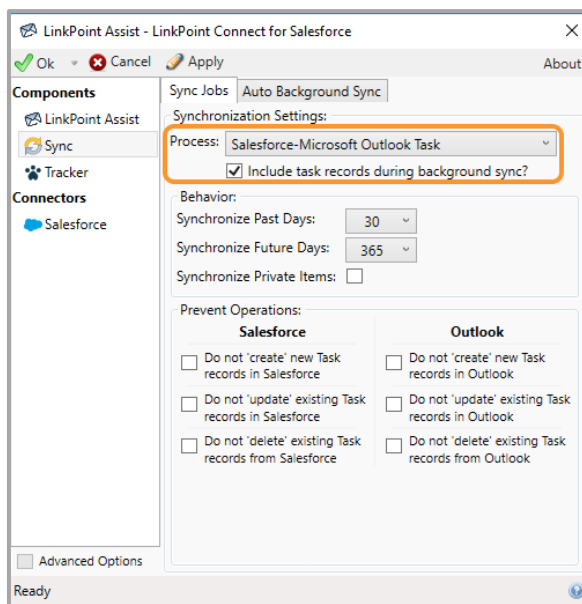
2

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



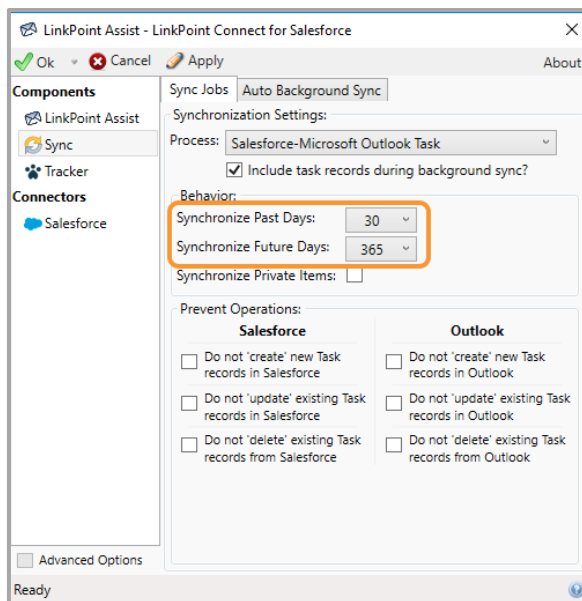
3

Select **Salesforce-Microsoft Outlook Task** from the **Process** drop-down list. Then click the checkbox for **Include task records during background sync?**



4

Select the number of days from the **Synchronize Past Days** and **Synchronize Future Days** drop-down lists. This will determine how many past and future tasks to include in the sync.



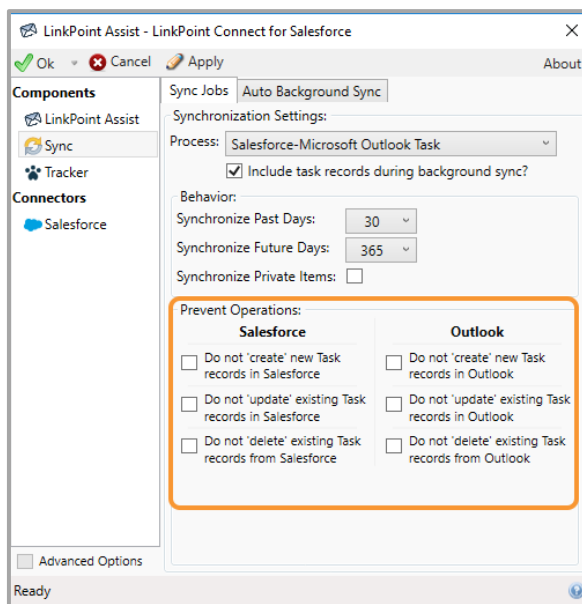
Tip: The default values are 30 past days and 365 future days. Note that tasks that fall outside of the specified sync range will no longer sync.



Tip: By default, private tasks will not sync. Users should mark tasks as private in Outlook and/or Salesforce prior to enabling the sync.

5

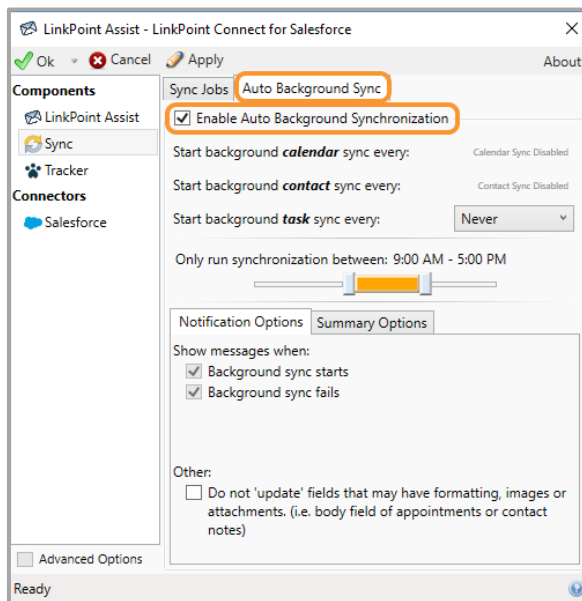
Select the options in the **Prevent Operations** section based on workflow need.



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

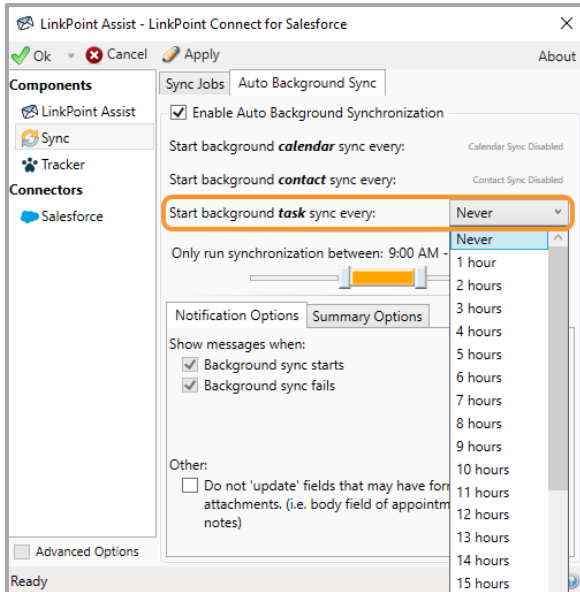
6

Select the **Auto Background Sync** tab, and click the **Enable Auto Background Synchronization** checkbox.



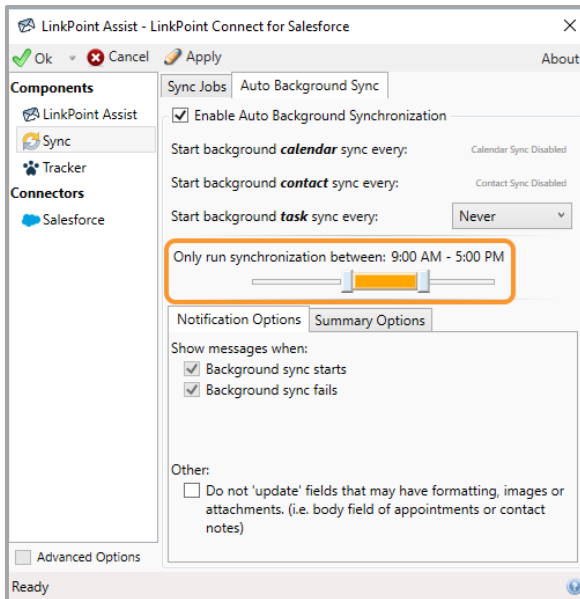
7

Select the frequency from the **Start background *task* sync every** drop-down list.

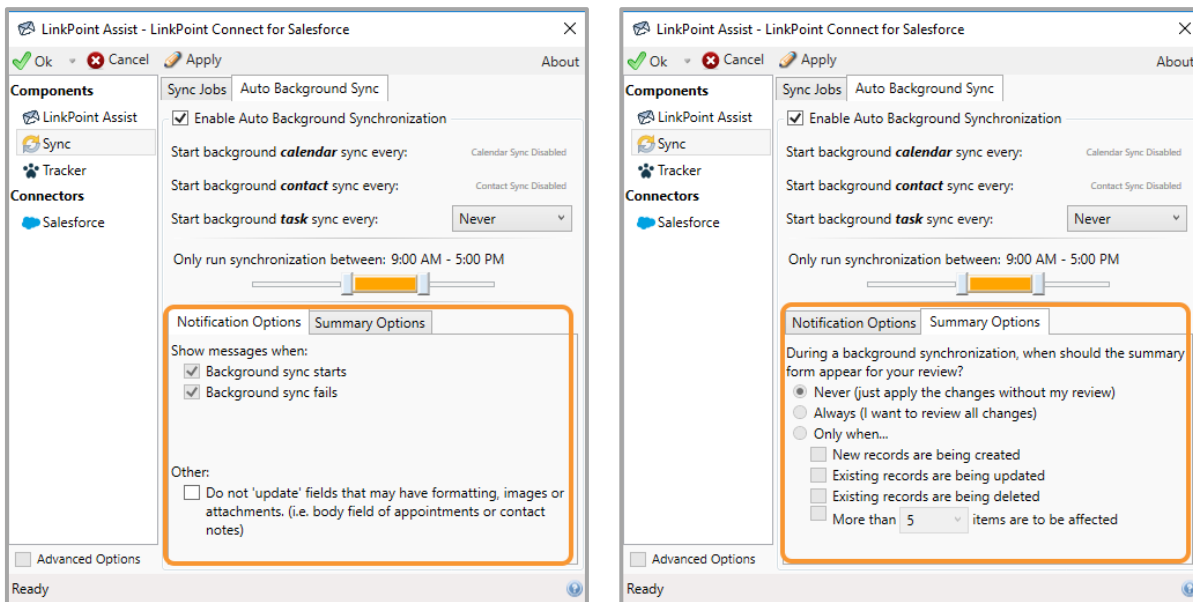


8

Select the time frame during which the auto sync should run by sliding the selectors to the left or right to adjust the range.

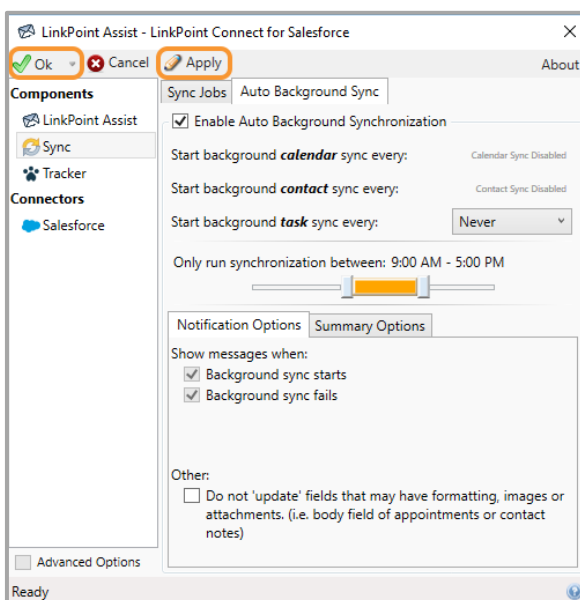


- 9 Review the settings in the **Notification Options** and **Summary Options** tabs. Select or deselect the checkboxes as needed to adjust how sync notifications and messaging are displayed.



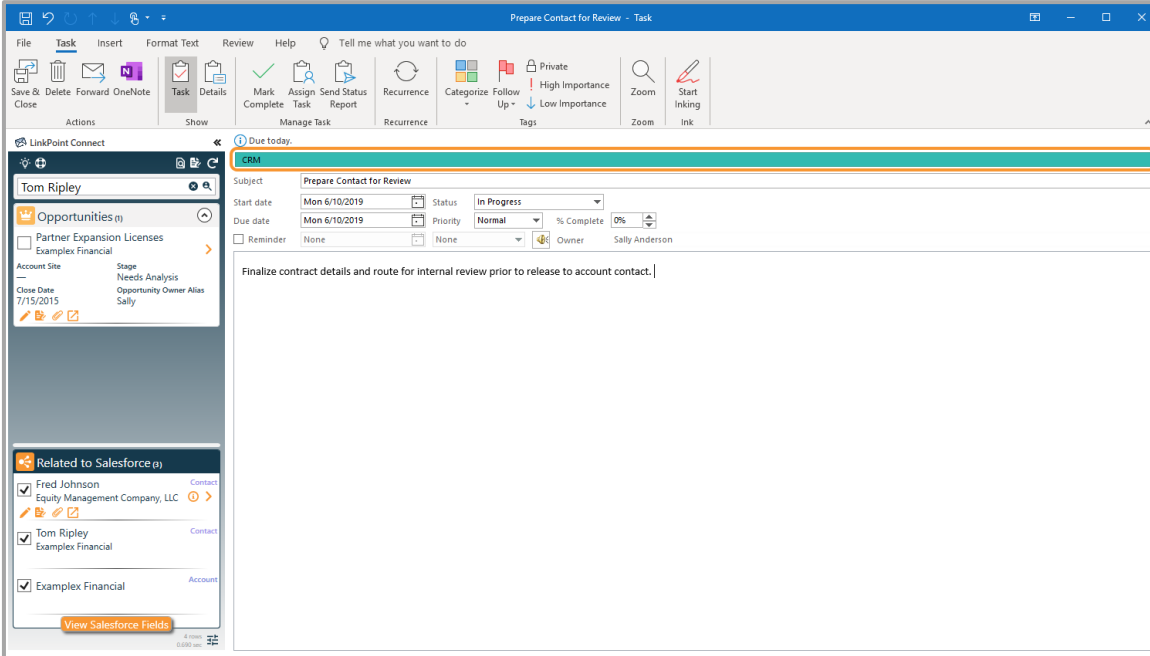
Tip: For example, a user may have a task in Outlook that contains special formatting (such as unique fonts or colors). When the task syncs to Salesforce, the original task retains its formatting in Outlook, but the copy in Salesforce loses the formatting due to Salesforce limitations. If the user makes a change in Salesforce, LinkPoint Connect may try to sync the most updated version back to Outlook, depending on user settings. Selecting the option to **Do not 'update' fields that may have formatting, images or attachments** will prevent the original body content in Outlook from being overwritten, thus preserving the formatting. Other details, such as subject or due date, will still update if necessary.

- 10 Click the **Apply** button when finished to finalize the settings. Click **Ok** to close LinkPoint Assist. LinkPoint Connect will sync the tasks at the scheduled interval based on the sync rules.





Tip: Users can also relate tasks to Salesforce records and update task fields from the Side Panel in Outlook. Users do not need to relate the task to a Salesforce record for it to sync with auto sync enabled.



The screenshot shows the Outlook 'Prepare Contact for Review' task window. The LinkPoint Connect side panel is open on the left, displaying a list of 'Related to Salesforce' items: Fred Johnson (Contact), Tom Ripley (Contact), and Exampex Financial (Account). The main task window shows the task details for 'Prepare Contact for Review', including start and due dates (Mon 6/10/2019), status (In Progress), priority (Normal), and owner (Sally Anderson). The task description is 'Finalize contract details and route for internal review prior to release to account contact.'



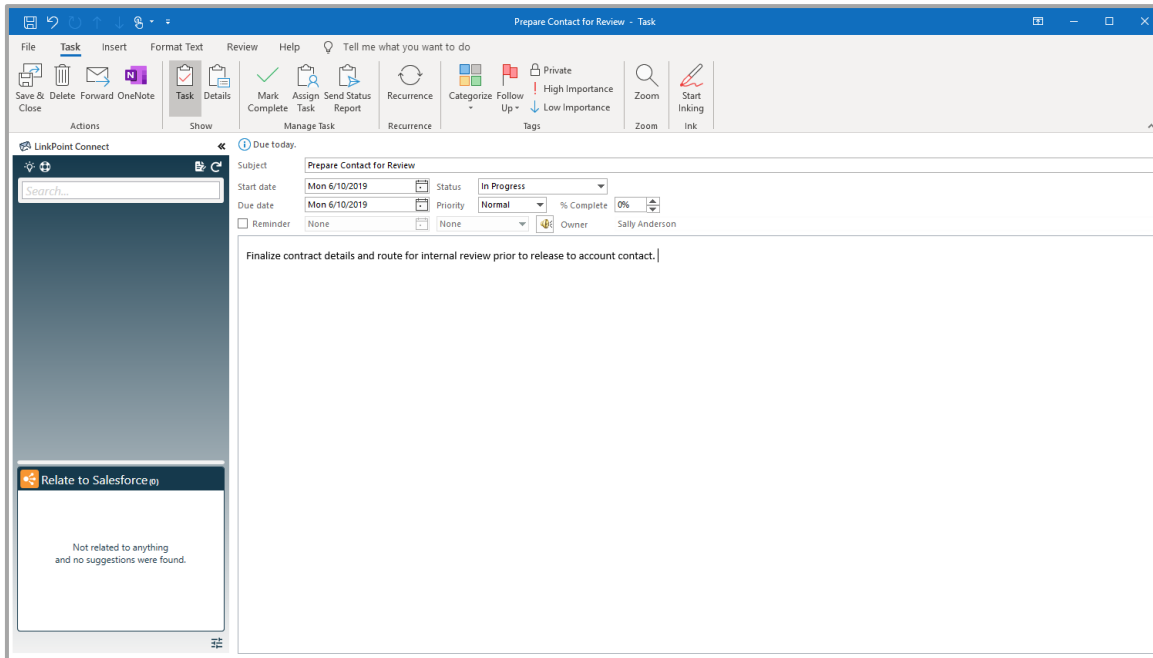
Additional Resources: Refer to the [Relate Tasks to Salesforce with Auto Sync](#) section of this User Guide for more information.

Relate Tasks to Salesforce with Auto Sync

Enabling auto sync for tasks will automatically move tasks between Outlook and Salesforce based on the established sync settings. Users do not need to relate tasks to Salesforce records for the auto sync to run. However, relating tasks to Salesforce records provides additional insight regarding a user's work and enhances Salesforce reporting. Users can relate tasks to Salesforce records using the Side Panel and complete SnapFields to update additional Salesforce information, if applicable.

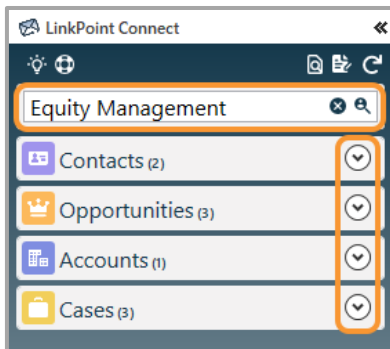
1

Create or open a **Task** in Outlook, and enter information for the item in the presented fields, as needed.

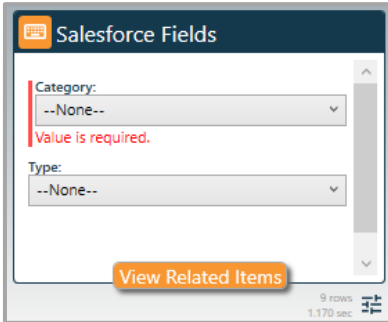


2

Search for relevant Salesforce records in the Side Panel. Click the **Expand** icon to view the list of available records for each object.

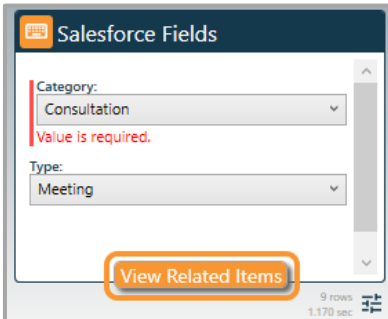


- 3 Review the SnapFields in the **Salesforce Fields** section of the Side Panel. Enter the values as applicable, noting that required fields are marked in red. These fields will be updated in Salesforce when the task is recorded.

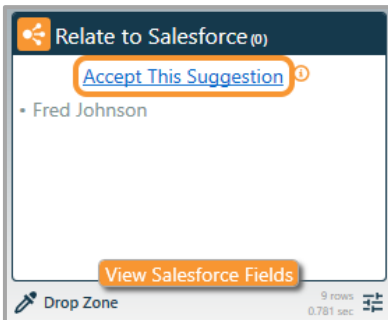


Tip: SnapFields appear in the Side Panel if the Salesforce task page layout includes either the type field and/or any custom required fields. Users cannot SnapRecord the task until required fields are completed. Some users may not have any SnapFields available.

- 4 Select the option to **View Related Items** to hide the SnapFields and to view options for recording the task to Salesforce.

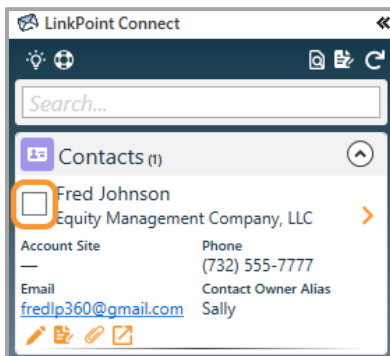


- 5 Select the option to **Accept This/These Suggestions** in the Relate to Salesforce section to record the task to all of the suggested records.



6

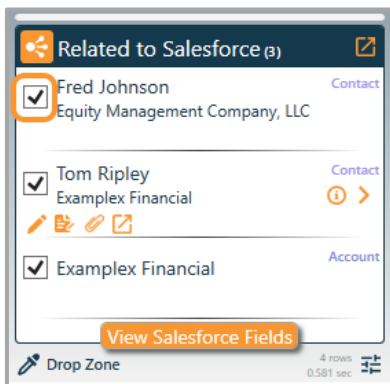
Select the **Relate to Salesforce** checkbox next to records in the Search Results to relate the task to the selected record.



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 task.

7

Deselect the **Relate to Salesforce** checkbox to disassociate the task from a selected record.



Tip: Some SnapShots may not include a checkbox to relate the task to a Salesforce record. The option to Relate to Salesforce only appears when working with a supported Outlook item (i.e. email, calendar event, or task). The checkbox will not appear if the Salesforce record does not include Activity History.

8

Save the task. The task will sync based on the established auto sync settings. The task will appear on the user's task list in Salesforce and will be related to the selected records, with fields updated, as applicable.

Set Sync Options

Configure and Run a Manual Sync

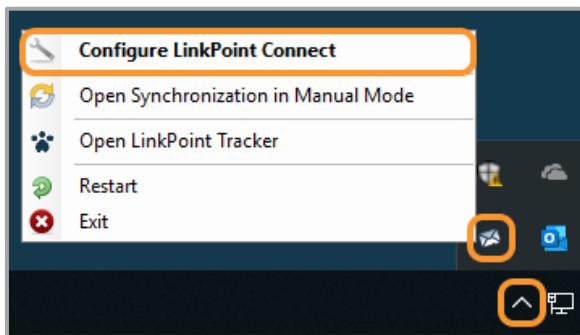
Control when and how calendar events, contacts, and tasks sync between Outlook and Salesforce with manual sync. Users leverage sync settings in LinkPoint Assist but must take action to run each sync. Users are prompted to review all items that will be considered for the sync and are given the option to include or exclude items before the sync runs. Manual sync is disabled by default and can be configured one-way or bidirectionally between systems for each sync type.



Example: In this example, we will demonstrate how to run a manual sync for calendar events. The settings and process are similar for contacts and tasks.

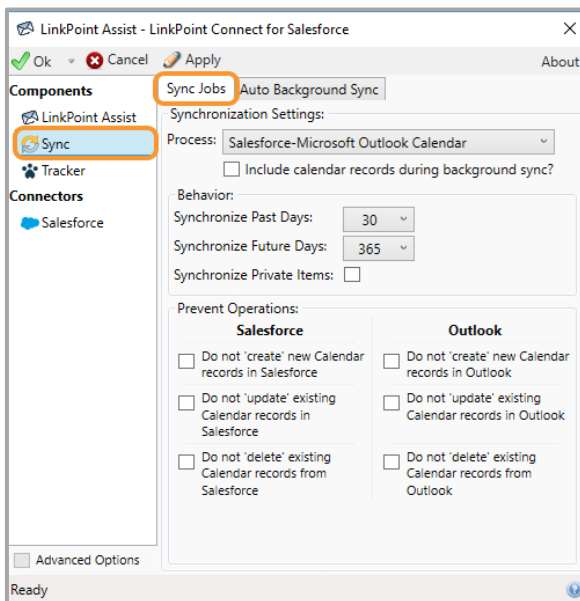
1

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

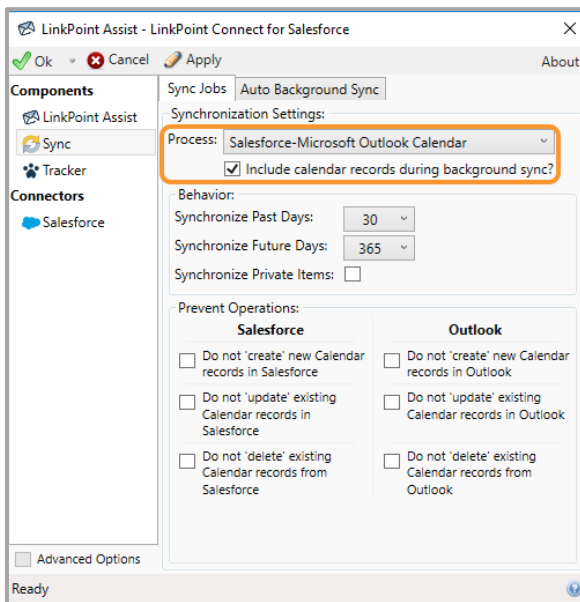


2

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

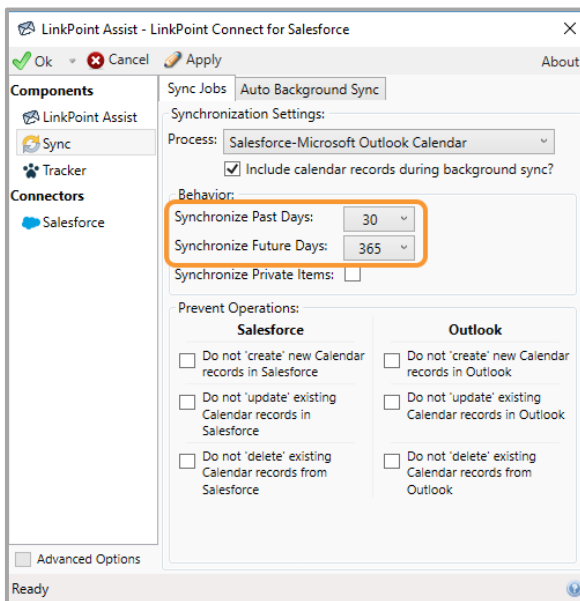


- 3 Select **Salesforce-Microsoft Outlook Calendar** from the **Process** drop-down list. Then click the checkbox for **Include calendar records during background sync?**



Tip: Sync settings for calendars, contacts, and tasks are managed separately to give users control over how data moves between Outlook and Salesforce. Users will need to choose sync settings individually for each Process by returning to the drop-down list and selecting the next item.

- 4 Select the number of days from the **Synchronize Past Days** and **Synchronize Future Days** drop-down lists. This will determine how many past and future calendar days to include in the sync.



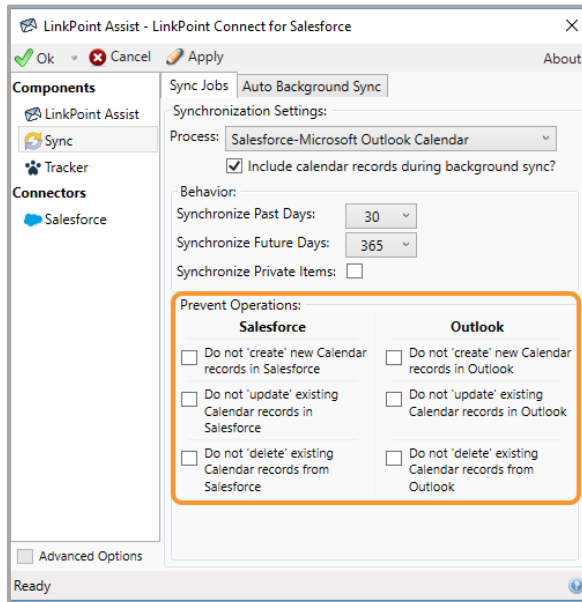
Tip: The default values are 30 past days and 365 future days. Note that items that fall outside of the specified sync range will no longer sync.



Tip: By default, private items will not sync. Users should mark calendar events as private in Outlook and/or Salesforce prior to enabling the sync.

5

Select the options in the **Prevent Operations** section based on workflow need.



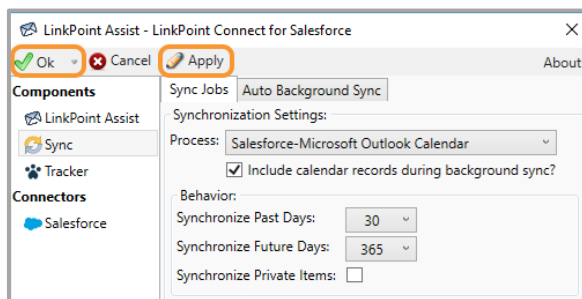
Tip: Users can prevent LinkPoint Connect from creating, updating, or deleting items regardless of any other system settings. Users can set this individually for Outlook and Salesforce, effectively creating bidirectional or one-way sync rules.



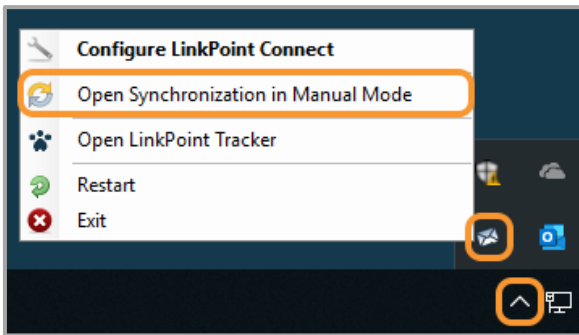
Tip: For contact sync, the **Do not 'delete' existing Contact records from Salesforce** option is selected by default in LinkPoint Connect as a precaution for users who do not want items removed from Salesforce. Users can deselect the checkbox to override this setting.

6

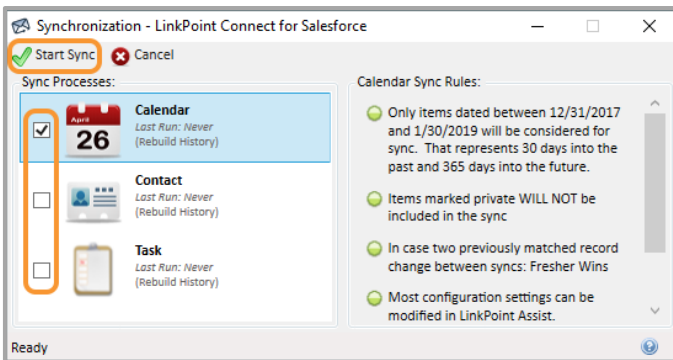
Click the **Apply** button when finished to finalize the settings. Click **Ok** to close LinkPoint Assist.



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



8 Select the **Calendar** checkbox. Deselect any other Sync Processes that should not sync at this time. Then click the **Start Sync** button to proceed.

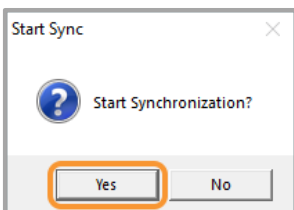


Tip: LinkPoint Connect will only sync one-to-one between a single Outlook calendar and Salesforce. This means that while users may have access to more than one Outlook calendar (i.e. personal calendar, a team or group calendar), users can only choose one calendar to sync with Salesforce. Note that if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



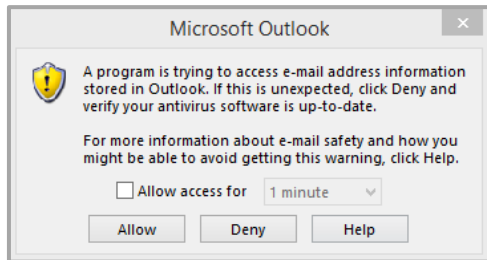
Tip: Users will have a chance to review and confirm the items to be synchronized before the tool runs the synchronization process.

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



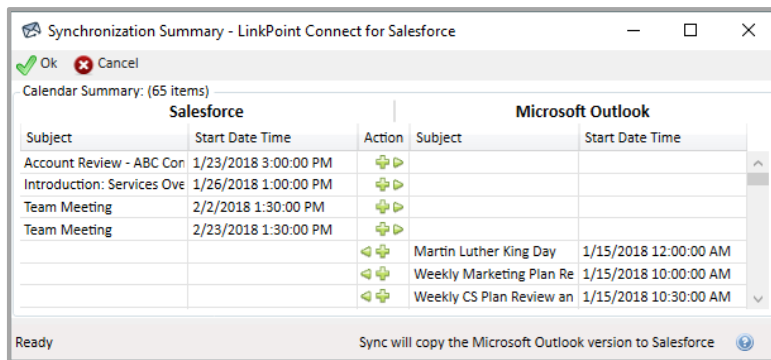


Tip: Users may need to allow LinkPoint Connect to access Outlook depending on system settings. This message often appears when users do not have antivirus activated or updated.



10

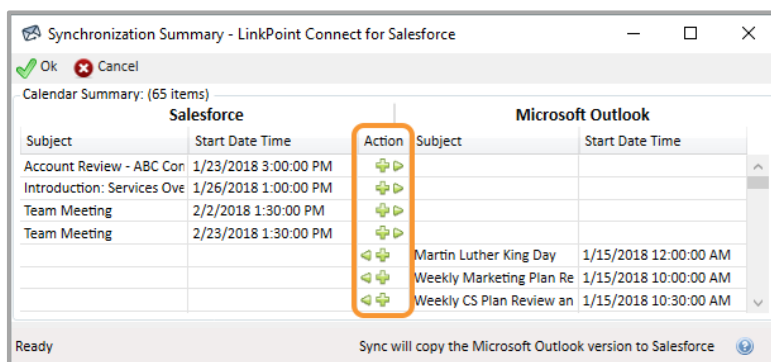
Review the **Synchronization Summary** window to see a list of all new or updated calendar events that match the established sync criteria. Calendar events that exist in Salesforce appear on the left. Calendar events that exist in Outlook appear on the right.










Tip: Attachments included with calendar events do not sync to Salesforce as part of the sync process. Users will see the file names of the attachments that were included in Salesforce but not the actual file(s).

11

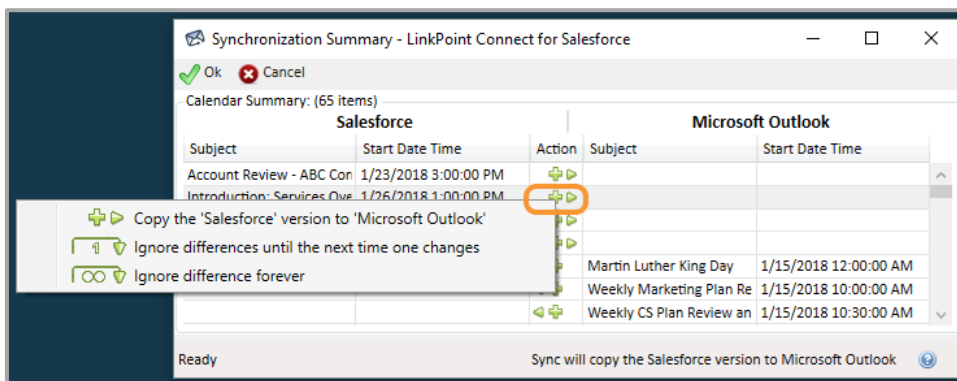
Review the icons in the **Action** column to determine how LinkPoint Connect will sync. These actions relate to new, updated, or deleted items either in Salesforce or Outlook.



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

12

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



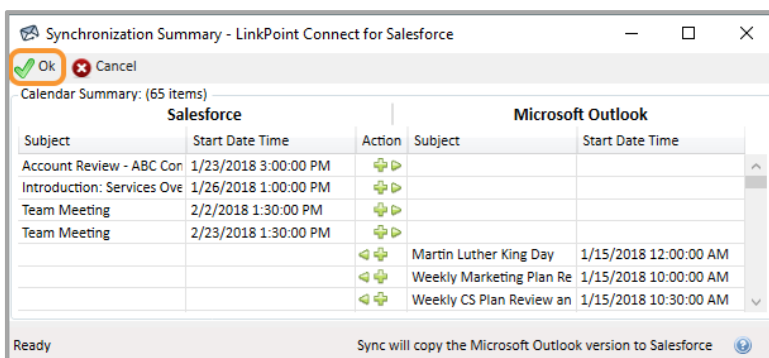
Tip: This is useful for excluding specific calendar events from the sync for a single time or to exclude a calendar event from the sync moving forward. Some users may have appointments that, while not marked as private, do not need to be or should not be added to Salesforce or Outlook.



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

13

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



Rebuild Sync History

Reset sync criteria to adjust expected sync behavior if a user syncs data in a way that does not meet workflow needs. The Rebuild History feature enables users to reestablish sync settings for both manual and auto sync of calendars, contacts, and tasks.



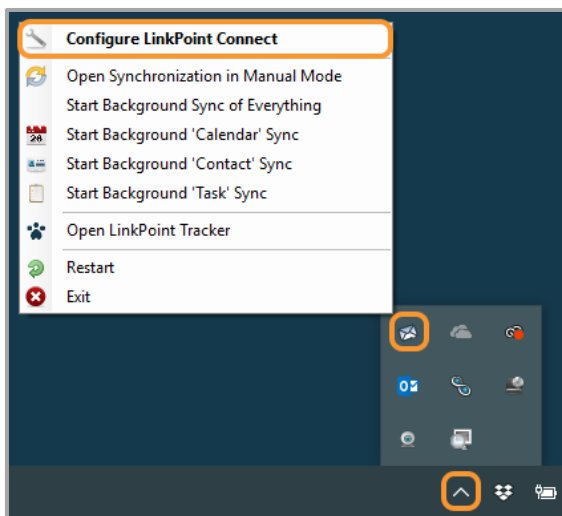
Warning: The Rebuild History feature does not remove or replace any items that were created, updated, or deleted in Salesforce or Outlook during the last sync. Rebuild History removes the relationships created between the systems so that the sync can be reset with new criteria moving forward.



Example: In this example, we will run the Rebuild History feature on the task sync. The process is the same for using Rebuild History with calendar and contact sync.

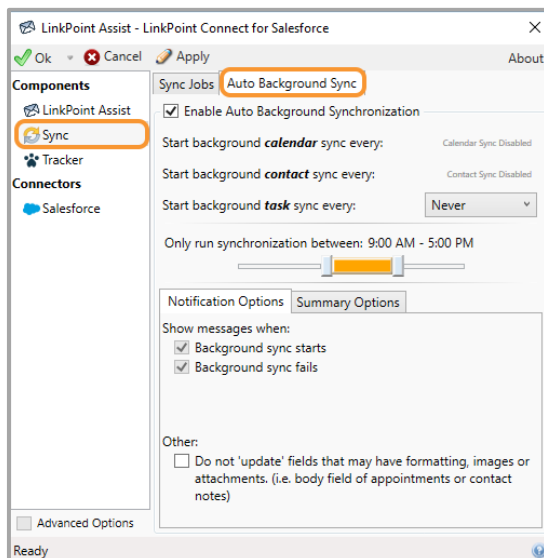
1

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

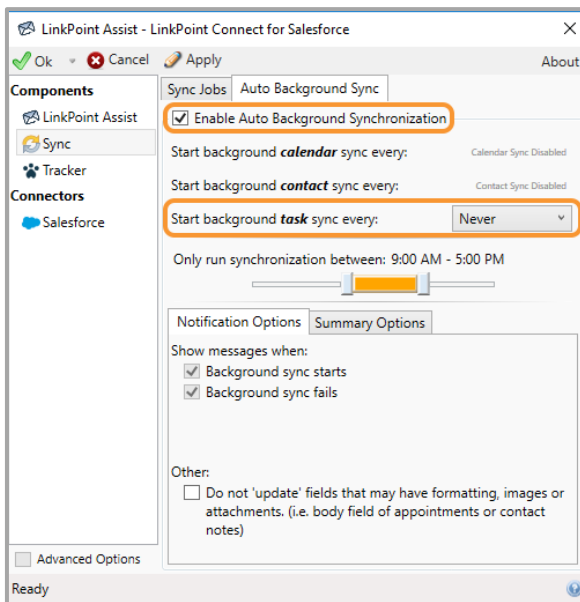


2

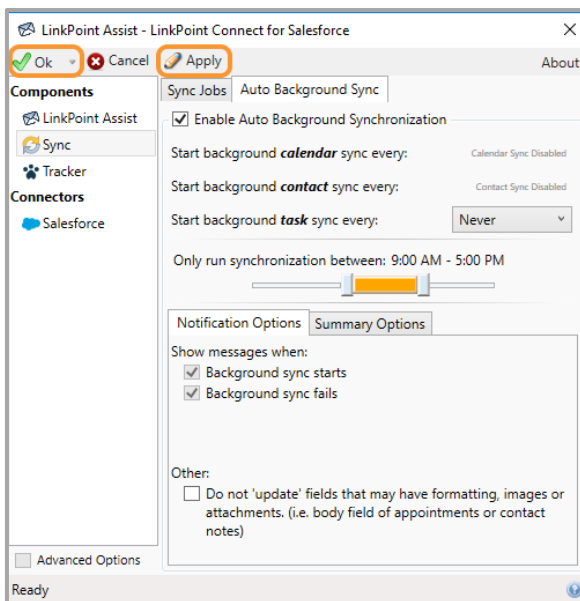
Select **Sync** from the **Components** list in the **LinkPoint Assist** window, and select the **Auto Background Sync** tab.



- 3 Select **Enable Auto Background Synchronization**. Select the **Never** option from the **Start background task sync every** drop-down list.

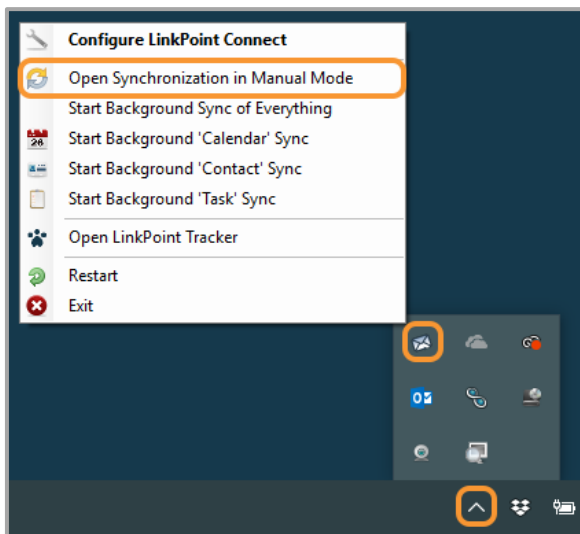


- 4 Click the **Apply** button when finished to finalize the settings. Click the **OK** button to close LinkPoint Assist.

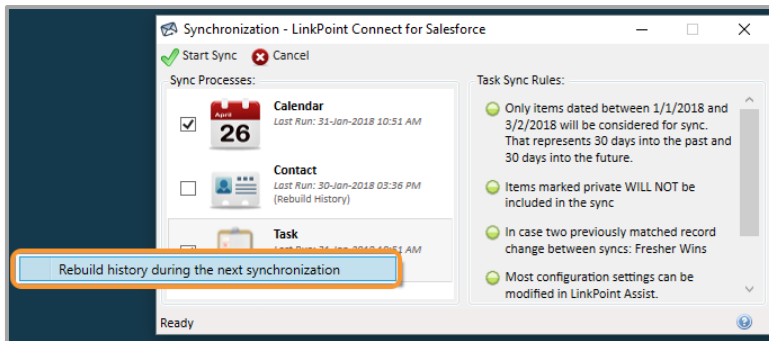


- 5 Remove or update any items in Salesforce or Outlook that were affected by prior sync as needed.

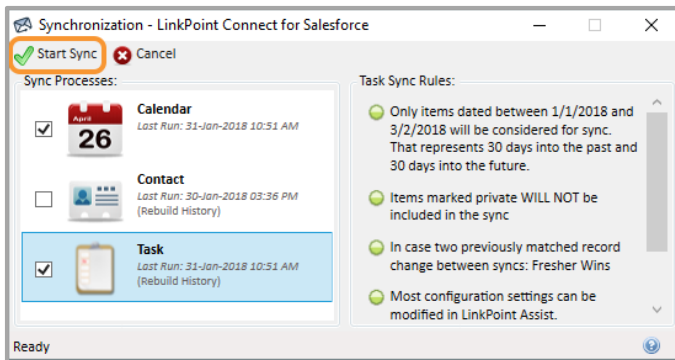
- 6 Right click the **LinkPoint Assist** icon in the system tray, and select **Open Synchronization in Manual Mode**.



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



- 8 Click the **Start Sync** button and proceed with running the manual sync.



 **Additional Resources:** Refer to the [Configure and Run a Manual Sync](#) section of this User Guide for more information.

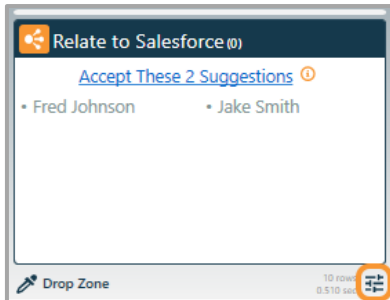
Configure LinkPoint Connect

Edit Preferences

Configure display, search, and other integration settings on a per-user basis in the Preferences Pane. Note that sync and Salesforce connection controls are located in LinkPoint Assist.

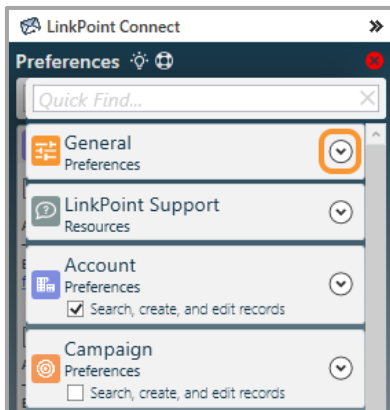
1

Click the **Preferences** icon in the bottom-right corner of the Side Panel to launch the Preferences Pane.



2

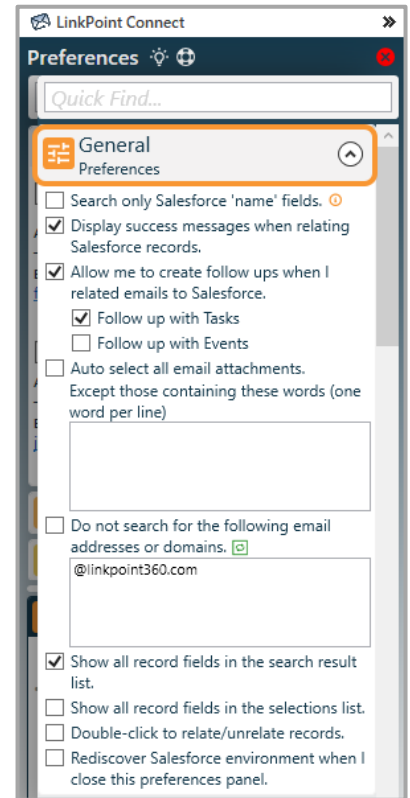
Click the **Expand** icon to view the list **General Preferences** for the Side Panel.



3

Review the available **General Preferences** settings. Note that some options are enabled by default. Select or deselect the checkboxes as needed to make changes. Changes are saved in real time.

- **Search only Salesforce 'name' fields:** Select this option to only search name fields in Salesforce. Deselect this option to search all fields on searchable records. This setting is disabled by default.
- **Display success messages when relating Salesforce records:** Select this option to view pop-up notifications when an item is recorded, created, or updated in Salesforce. This setting is enabled by default.
- **Allow me to create follow ups when I related emails to Salesforce:** Select this option to enable the follow up icon in the Related to Salesforce section of the Side Panel. Choose to set the default follow up type with the **Follow up with Tasks** or the **Follow up with Events** options. This setting is enabled by default for creating tasks.
- **Auto select all email attachments:** Select this option to record attachments to Salesforce. Indicate which file types to exclude by entering file names or types in the field box. This setting is disabled by default.
- **Do not search for the following email addresses or domains:** Select this option to specify email addresses or domains to exclude from the Side Panel. Enter the content into the field box with one item on each line. This setting is enabled by default with the end user's email address populated.
- **Show all record fields in the search result list:** Select this option to show all of the available fields for an object in the SnapShot in the Side Panel Search Results. This setting is enabled by default.
- **Show all record fields in the selections list:** Select this option to show all of the available fields for an object in the SnapShot in the Related to Salesforce section of the SidePanel. This setting is disabled by default, showing the SnapShot in a Compact view.
- **Double-click to relate/unrelate records:** Select this option to enable a shortcut for relating emails to Salesforce. This setting is disabled by default.
- **Rediscover Salesforce environment when I close the preferences panel:** Select this option to force LinkPoint Connect to check Salesforce for updates to objects and fields. This will refresh SnapForms and SnapFields. This setting is disabled by default, but LinkPoint Connect will automatically check for changes once every 24 hours.



Tip: When working with attachments, users can list file extensions such as *.png* or *.jpg* to screen out images commonly found in email signatures. Users can filter out files with words such as *brochure* or *pricing* to exclude items commonly sent to people that do not need to be saved repeatedly in Salesforce.

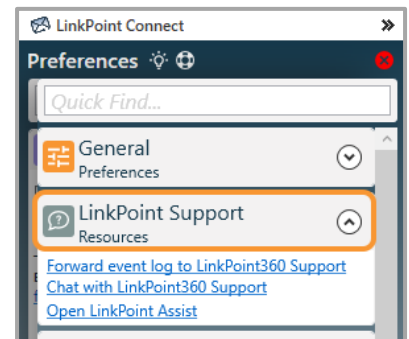


Tip: The option to exclude based on email address(es) and domain(s) is especially useful for excluding the user or others in the organization from the Search Results.

4

Click the **Expand** icon to view the list of **LinkPoint Support Resources**.

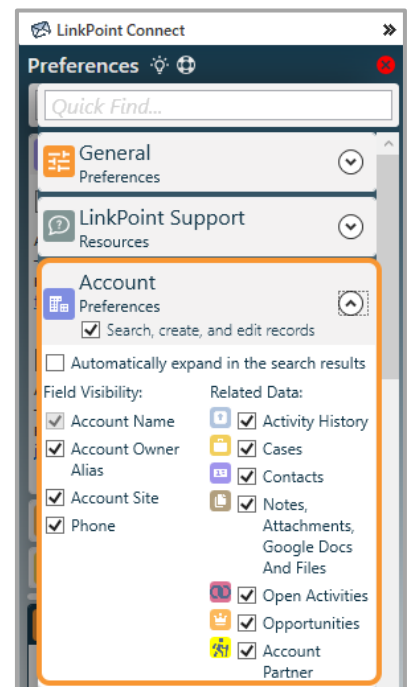
- **Forward event log to LinkPoint360 Support:** Select the link to send event logs to LinkPoint360 support when requested.
- **Chat with LinkPoint360 Support:** Select the link to launch a support chat window (available during standard business hours).
- **Open LinkPoint Assist:** Select the link to launch the LinkPoint Assist window to adjust Salesforce connection, update, tracker, and sync settings as needed.



5

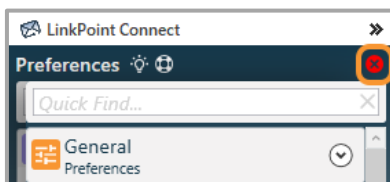
Click the **Expand** icon for the listed object group in the Preferences Pane. Note that the list of available objects will vary by user.

- **Search, create, and edit records:** Enable an object as a SnapForm and allow records for the object to appear in the Search Results. This setting is enabled by default for all objects that the user has access to and has also actively engaged with in Salesforce.
- **Automatically expand in the search results:** Force the object to appear expanded by default.
- **Field Visibility:** Include the selected fields in records SnapShots for the object. All available fields are enabled by default. Name fields cannot be disabled.
- **Related Data:** Include the selected related lists for the object when displaying Record Details. All available related lists are enabled by default.



6

Click the red x icon in the top-right corner to close the Preferences Pane. Note that the setting changes are made in real time.

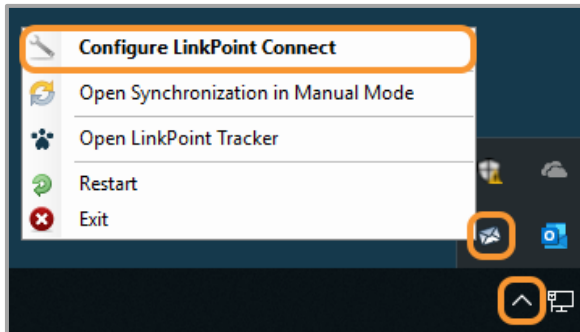


Configure Web Proxy

Users can configure LinkPoint Connect to work with existing network and web proxy or firewall settings. Users who cannot add LinkPoint Connect to a list of trusted applications can enter proxy server details in Assist.

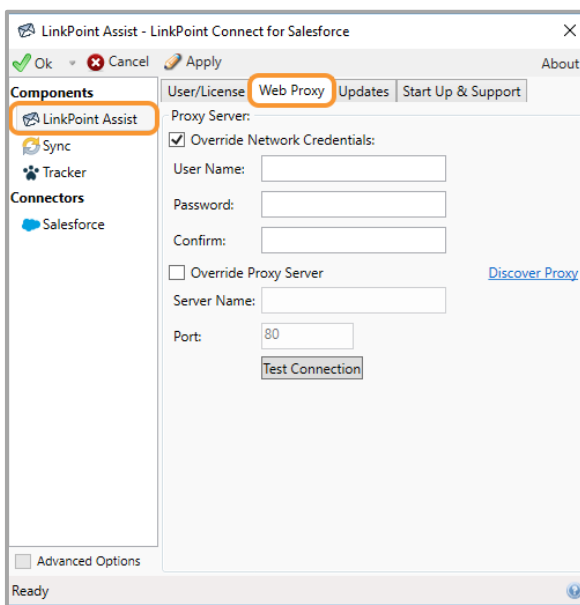
1

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



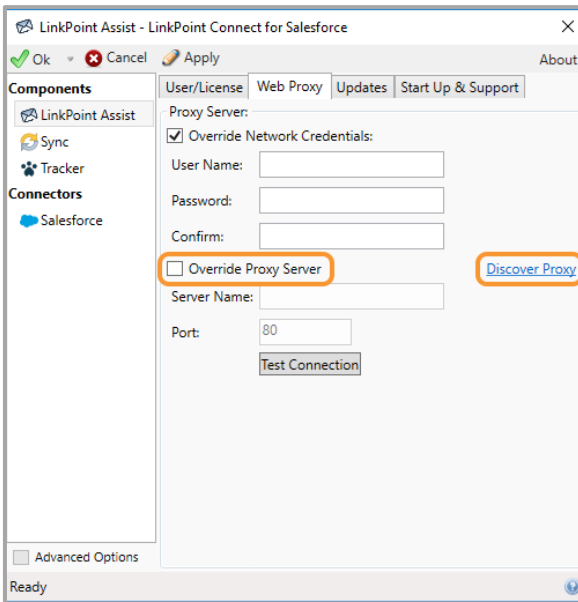
2

Select **LinkPoint Assist** from the **Components** list in the **LinkPoint Assist** window, and select the **Web Proxy** tab.



3

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.



LinkPoint Assist - LinkPoint Connect for Salesforce

Ok Cancel Apply About

Components

- LinkPoint Assist
- Sync
- Tracker

Connectors

- Salesforce

Web Proxy

Proxy Server:

- ☒ Override Network Credentials:
 - User Name:
 - Password:
 - Confirm:
- ☒ Override Proxy Server

[Discovery Proxy](#)

Server Name:

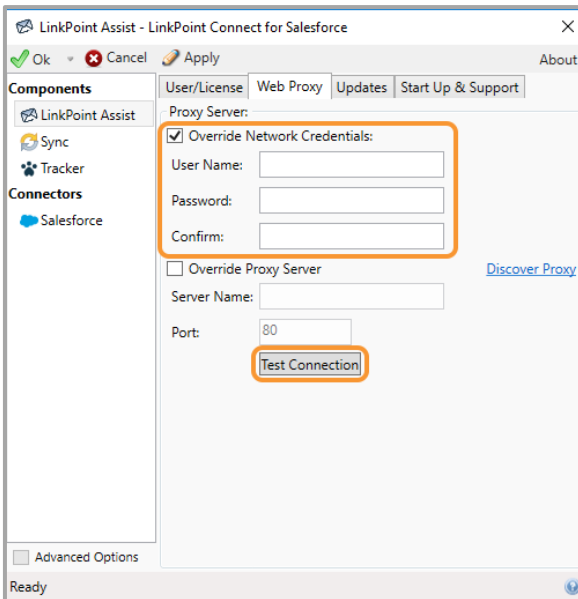
Port:

☐ Advanced Options

Ready



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



LinkPoint Assist - LinkPoint Connect for Salesforce

Ok Cancel Apply About

Components

- LinkPoint Assist
- Sync
- Tracker

Connectors

- Salesforce

Web Proxy

Proxy Server:

- ☒ Override Network Credentials:
 - User Name:
 - Password:
 - Confirm:
- ☐ Override Proxy Server

[Discovery Proxy](#)

Server Name:

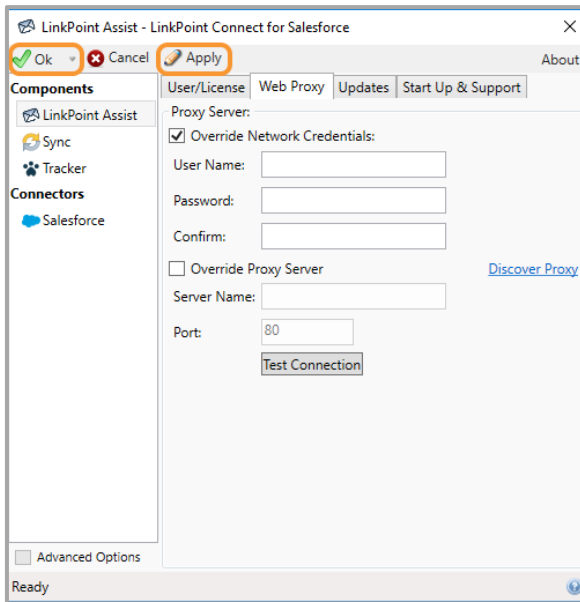
Port:

☐ Advanced Options

Ready

4

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

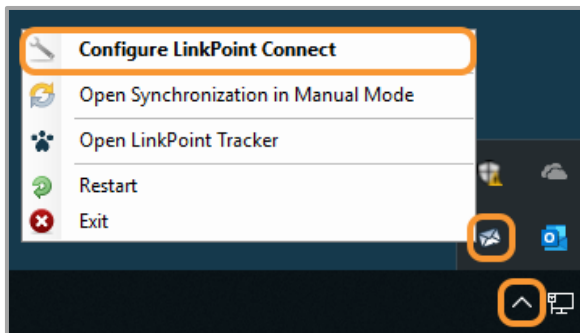


Configure Updates

Users can configure LinkPoint Connect to update automatically or with notice. Users can also disable updates as needed. Updates are included in the annual subscription. Some companies choose to disable updates altogether for workflow, training, customization, or other security reasons.

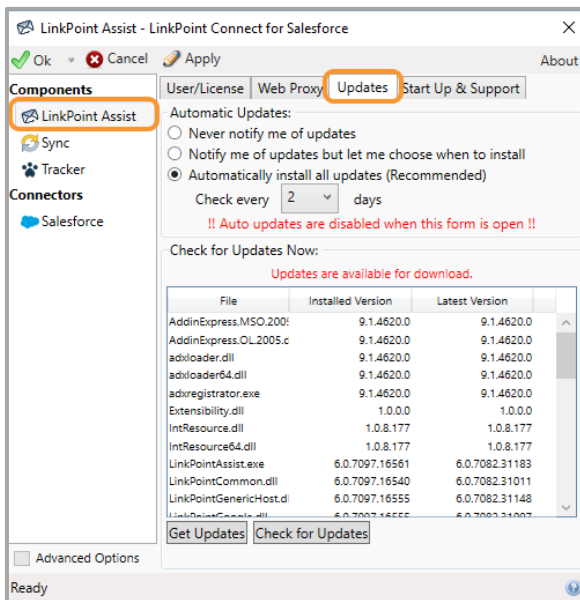
1

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



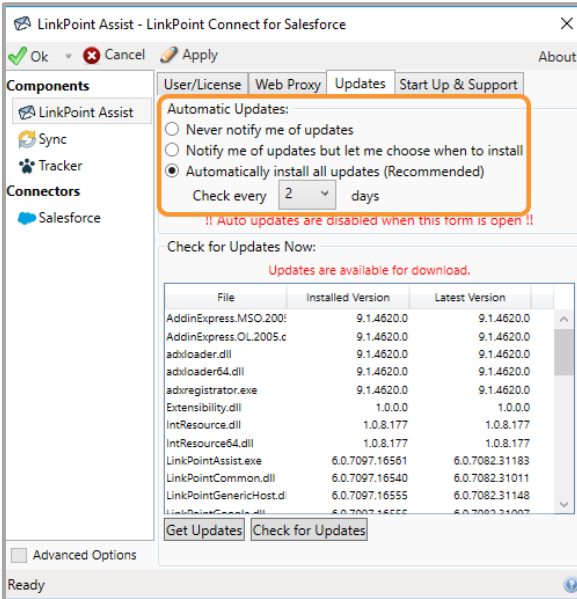
2

Select **LinkPoint Assist** from the **Components** list in the **LinkPoint Assist** window, and select the **Updates** tab.



3

Select from the available settings as needed. Users can choose to let updates run automatically, approve updates before they are installed, or prevent updates altogether. Users can also set how frequently LinkPoint Connect should check for updates with the **Check every X days** drop-down list.



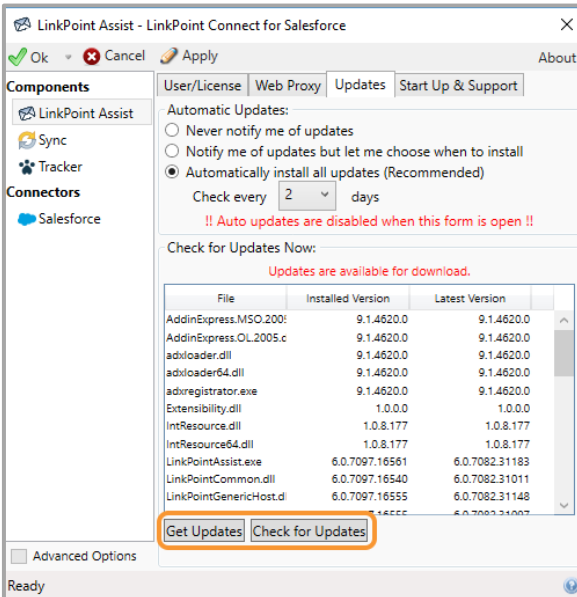
File	Installed Version	Latest Version
AddinExpress.MSO.2003	9.1.4620.0	9.1.4620.0
AddinExpress.OL.2005.c	9.1.4620.0	9.1.4620.0
adxlloader.dll	9.1.4620.0	9.1.4620.0
adxlloader64.dll	9.1.4620.0	9.1.4620.0
adxregistrator.exe	9.1.4620.0	9.1.4620.0
Extensibility.dll	1.0.0.0	1.0.0.0
IntResource.dll	1.0.8.177	1.0.8.177
IntResource64.dll	1.0.8.177	1.0.8.177
LinkPointAssist.exe	6.0.7097.16561	6.0.7082.31183
LinkPointCommon.dll	6.0.7097.16540	6.0.7082.31011
LinkPointGenericHost.d	6.0.7097.16555	6.0.7082.31148
LinkPointGenericHost.dll	6.0.7097.16555	6.0.7082.31007



Tip: LinkPoint Connect is set by default to **Automatically install all updates** and will check for updates every two days.

4

Click the **Check Updates** button to manually check for updates. Then click the **Get Updates** button to download the update. Restart Assist and Outlook in order to apply the changes.



Warning: Most 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 the user's internal IT team. If users do not see the Updates tab or do not have the ability to Get Updates, contact an internal IT admin for assistance.

Activate Sandbox Mode

Activate Sandbox Mode to connect to a sandbox instance of Salesforce for testing customized application settings as provided by LinkPoint360 Professional Services. Note that LinkPoint Connect will rediscover all Salesforce access and settings when switching between Production and Sandbox instances of Salesforce. This may cause user preferences to be overwritten in the Preferences Pane as the objects and fields available may change between Salesforce accounts.



Warning: Customers must create new credentials for the LinkPoint360 Professional Services team to access the Salesforce Sandbox environment. These credentials must match the following standard exactly:

Username: proservice@linkpoint360.com.[\[YourCompanyName\]](#)

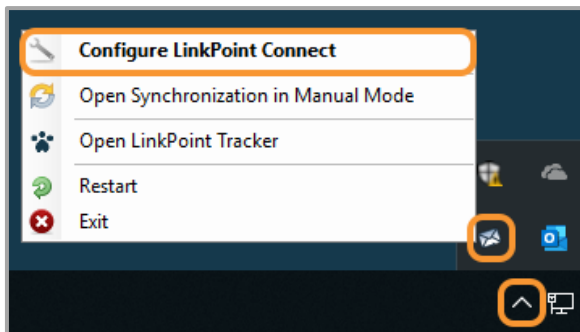
Email: proservice@linkpoint360.com



Warning: When switching between Sandbox and Production modes and Salesforce accounts, remember to rebuild history during the next sync. Otherwise, users may delete calendar, contact, and task data.

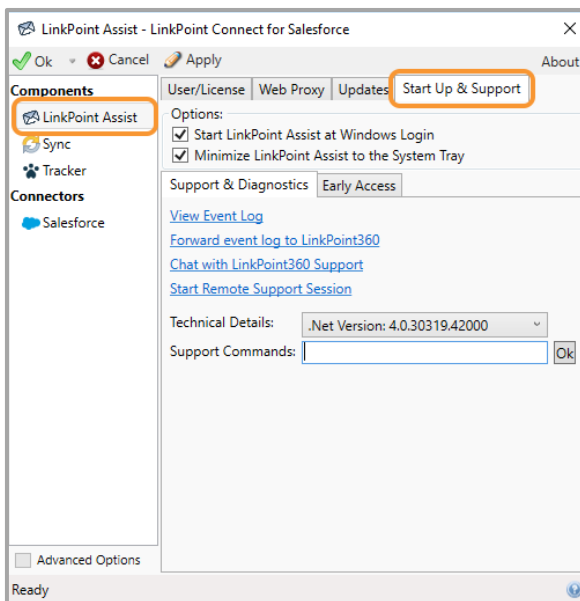
1

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



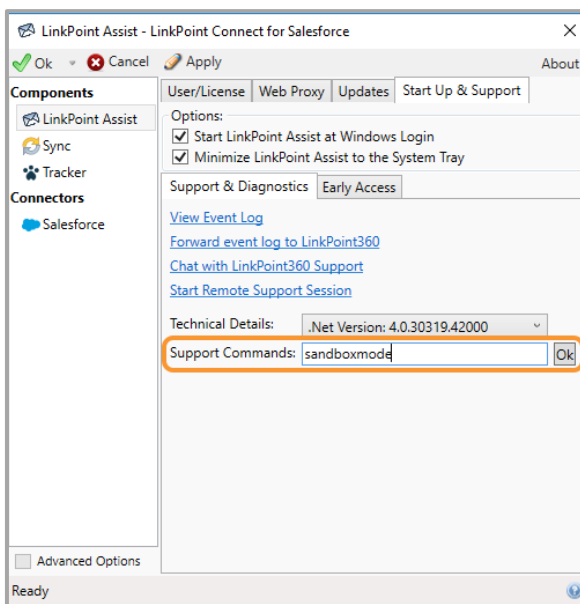
2

Select **LinkPoint Assist** from the **Components** list in the **LinkPoint Assist** window, and select the **Start Up & Support** tab.

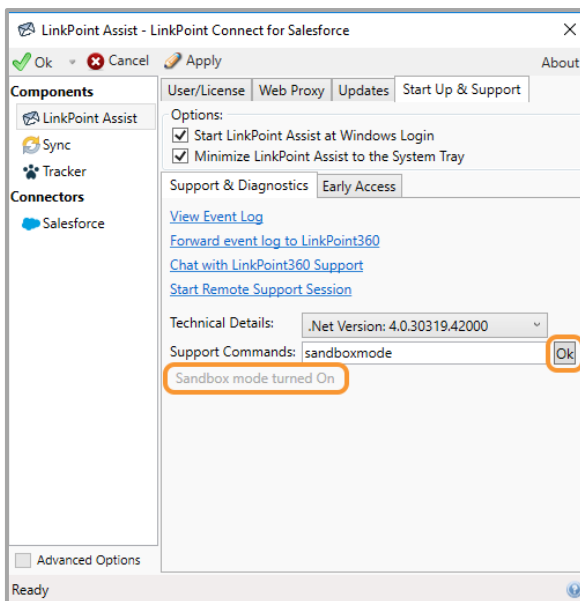


3

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**.



3

Configure LinkPoint Connect with the sandbox instance of Salesforce.



Additional Resources: Refer to the [Configure LinkPoint Connect](#) section of this User Guide for more information.

Configure a Salesforce Partner Community Account

Salesforce Partner Community users can integrate with Outlook using LinkPoint Connect. Partners can access these Salesforce instances with individual credentials and interact with Salesforce data without the need to log into a Partner Community directly.

- 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 users notice that the LinkPoint Connect Side Panel is not displaying records correctly, an additional setting in the LinkPoint Connect configuration may be required.

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 the 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**.

Create LinkPoint Connect Usage Reports in Salesforce

Companies that roll out LinkPoint Connect across an 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.



Warning: The following steps can only be followed by Salesforce users with admin privileges to create and alter fields in Salesforce and across an organization.

1

Create a new Date\Time type field named **LinkPointTouchDate__c** in Salesforce. Add this field to **Contact**, **Task**, and **Event** objects.

2

Provide access to the new field for all necessary Salesforce users or profiles. 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 in Salesforce every time a user syncs or records information. This will show the last time LinkPoint Connect updated the record.

4

Create a report in Salesforce including the **LinkPointTouchDate__c** field to view the updated records.



Tip: Salesforce admins do not need to expose the LinkPointTouchDate__c field on the object(s) page layout(s) in order to collect data. The field is automatically exposed to the LinkPoint Connect API.