Admin Setup Guide

LinkPoint Blade

Outlook Add-In Installation and User Setup Overview

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Overview

About This Guide

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

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

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

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

Admin Setup Guide

Installing the LinkPoint Blade Add-In for Outlook

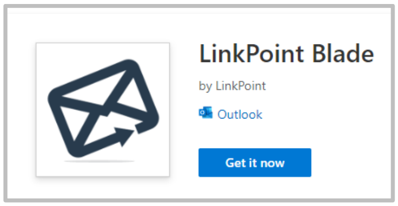
Tip: PC or Mac users should install LinkPoint Blade via the Outlook desktop application or webmail when getting started. Users looking to access the application from a mobile phone must have the official Outlook mail app installed and should install on PC or Mac first to gain automatic access to LinkPoint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

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

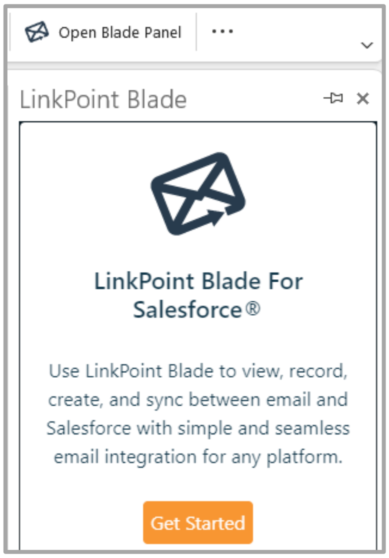
1 Access the LinkPoint Blade Add-In by clicking this link for the Microsoft AppSource store.

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

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



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



Approve LinkPoint Blade from the Office 365 Admin Center

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

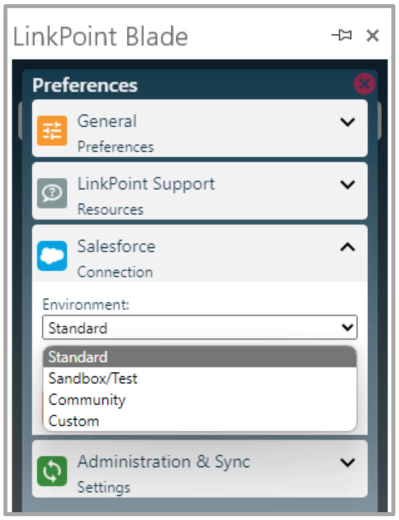
1. Log in to Office 365 Admin Center via https://portal.office.com/adminportal/
2. Either install LinkPoint Blade from the Microsoft AppSource, or if a user has attempted to install the Add-In, the LinkPoint Blade Application will already exist in the application list.
3. Grant admin consent for LinkPoint Blade.
4. Assign permissions to Users and/or Groups.

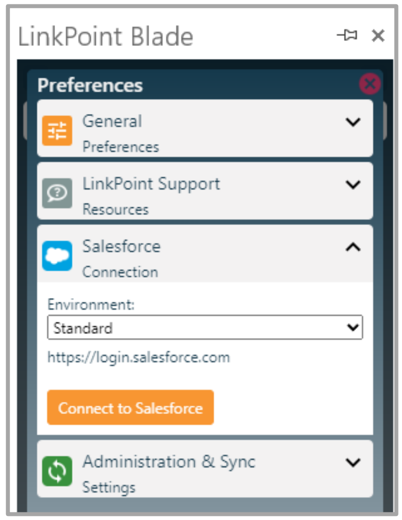
Tip: Users who install via desktop or webmail should have automatic access to LinkPoint Blade on their mobile devices through Outlook. Note that the application is designed for Outlook compatibility and will not run on third-party mail applications. Users must already have the Outlook app downloaded on their mobile device. iPad users may have the best user experience by accessing LinkPoint Blade through Outlook Webmail.

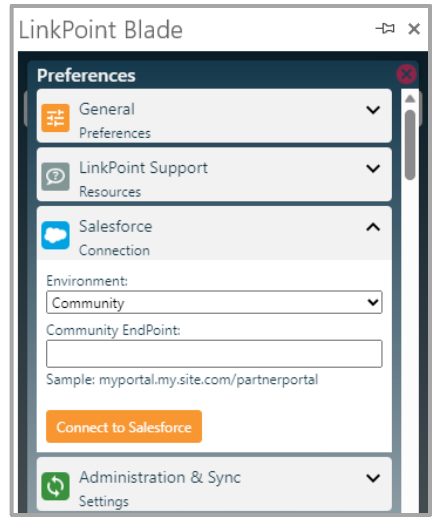
Connecting to Salesforce

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

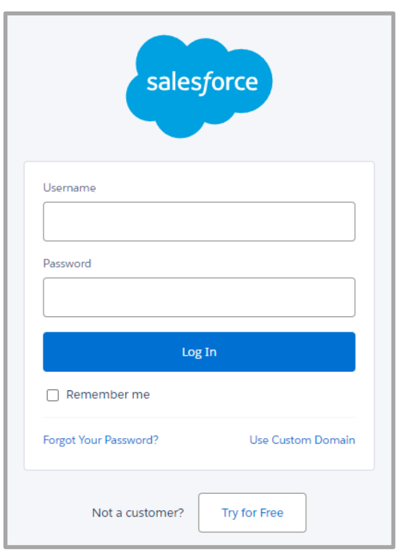
1 LinkPoint Blade will launch the Preferences Pane. Select the **Salesforce Environment** that reflects your planned usage. Then click the **Connect to Salesforce** button. Note that choosing the Custom or Community option will require you to enter your Salesforce URL manually.

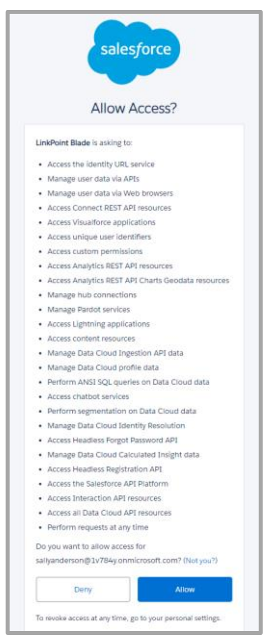






2 Log into Salesforce with the **Username** and **Password** of the account that includes the users you want to invite to LinkPoint Blade. Click **Allow** to grant LinkPoint Blade access to Salesforce.

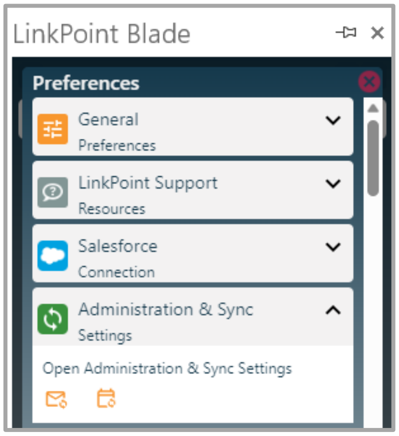




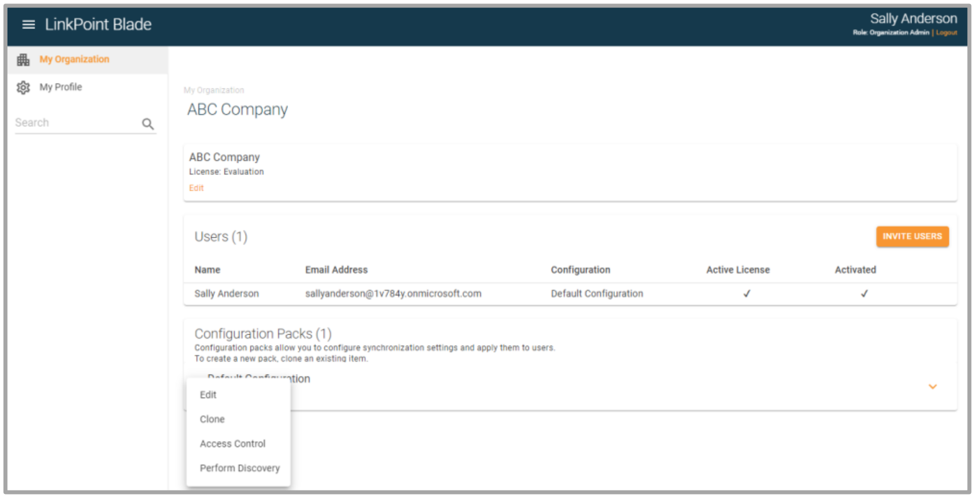
Confirming the Salesforce URL

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

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



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

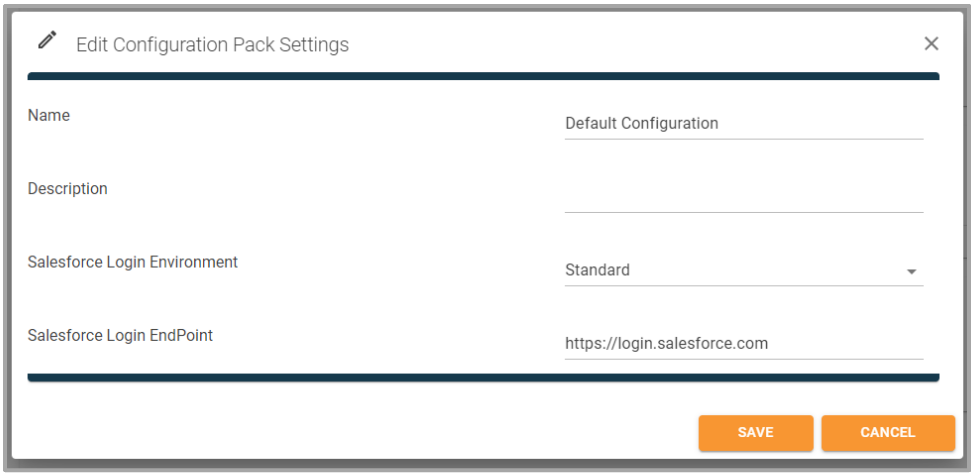


Tip: Access Control features offer a more in-depth way to configure settings for both auto sync and Side Panel options. These are recommended for advanced users. For more information, please contact your Account Executive or support@linkpoint360.com.

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

4

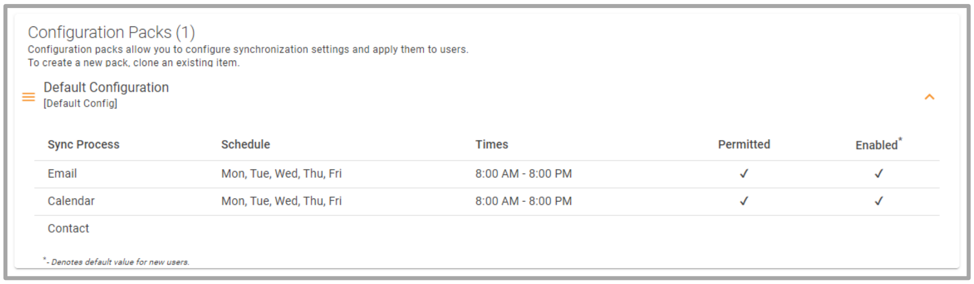
Confirm the information in the **Salesforce Login Environment** and **Salesforce Login EndPoint** fields are correct based on the Salesforce org you want to use to sync data and import users. You can also rename the Configuration Pack at this time to reflect the group you plan on applying the settings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



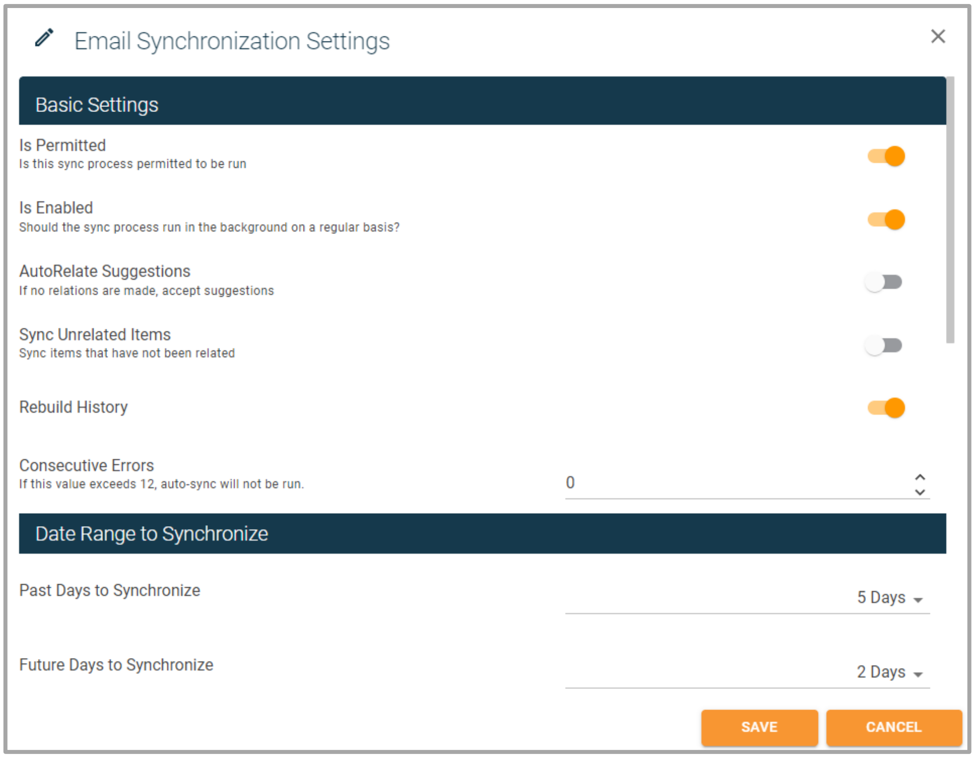
Establishing Email Sync Settings via Configuration Packs

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

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



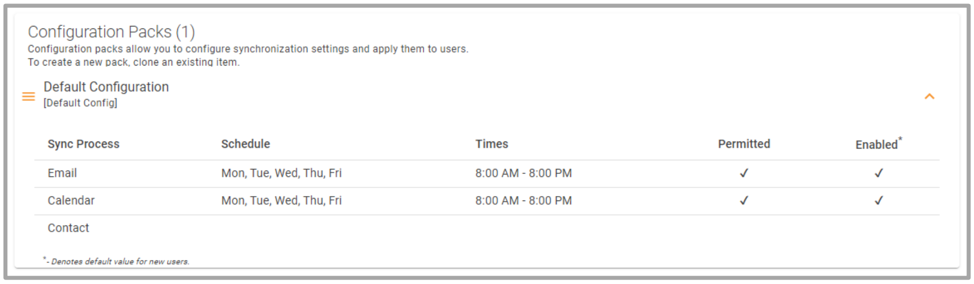
2. Review and update the available settings to reflect how you would like users to record or sync emails. **Fields** can be toggled on and off or updated from drop-down lists as needed. Note that the window scrolls to reveal a series of settings. Make any applicable changes, and click **Save** when complete.



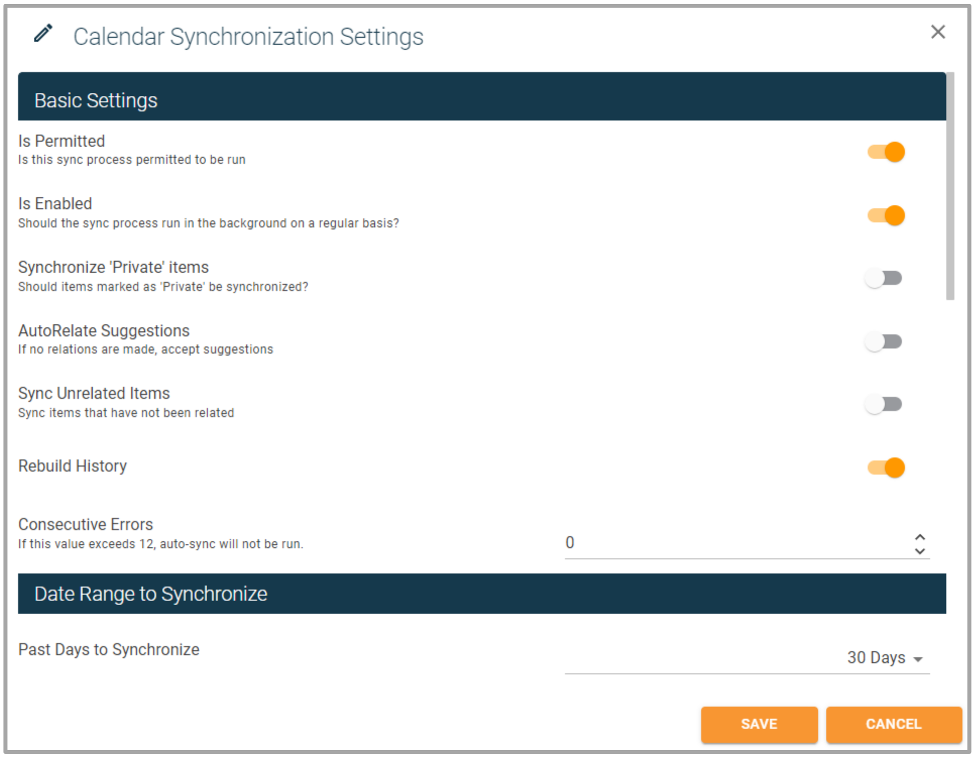
Basic Settings	
Is Permitted	Enables or disables email sync for all users in the Configuration Pack
Is Enabled	Runs email sync automatically in the background
AutoRelate Suggestions	Syncs emails to Salesforce automatically if no selection is made in the Side Panel
Sync Unrelated Items	Sync emails that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

Establishing Calendar Sync Settings via Configuration Packs

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



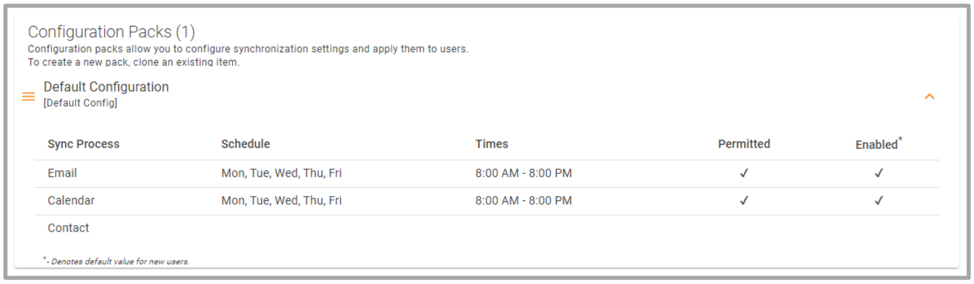
2 Review and update the available settings to reflect how you would like users to sync calendars. **Fields** can be toggled on and off or updated from drop-down lists as needed. Note that the window scrolls to reveal a series of settings. Make any applicable changes, and click **Save** when complete.



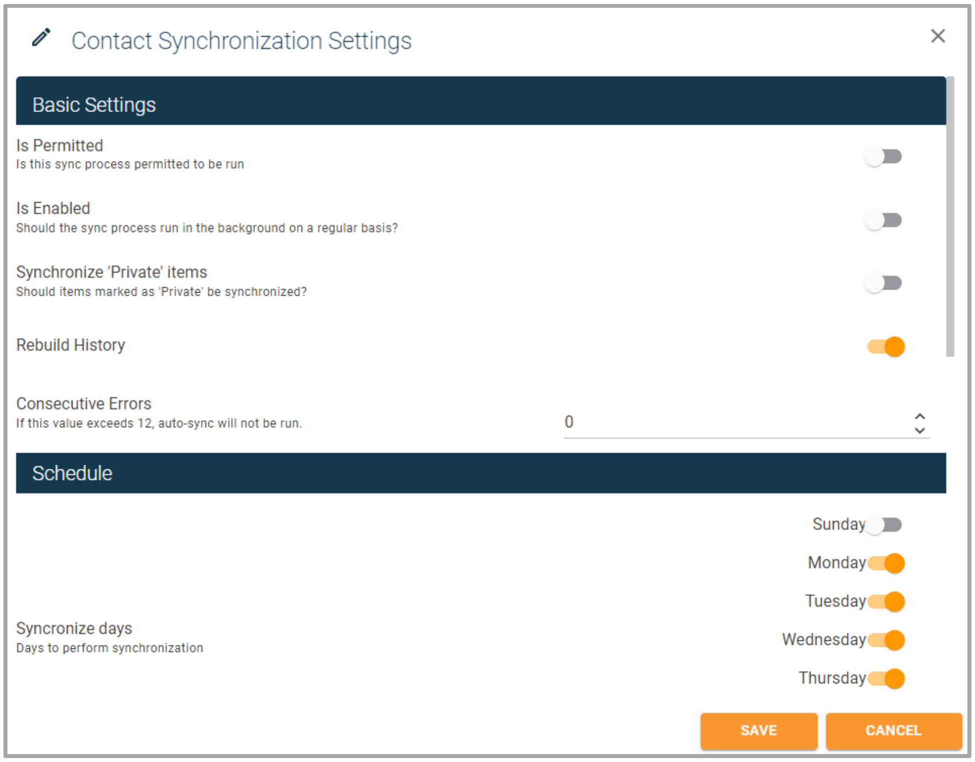
Basic Settings	
Is Permitted	Enables or disables calendar sync for all users in the Configuration Pack
Is Enabled	Runs calendar sync automatically in the background
Synchronize ‘Private’ Items	Determines whether calendar items marked Private should be synced
AutoRelate Suggestions	Syncs calendar items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

Establishing Contact Sync Settings via Configuration Packs

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



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

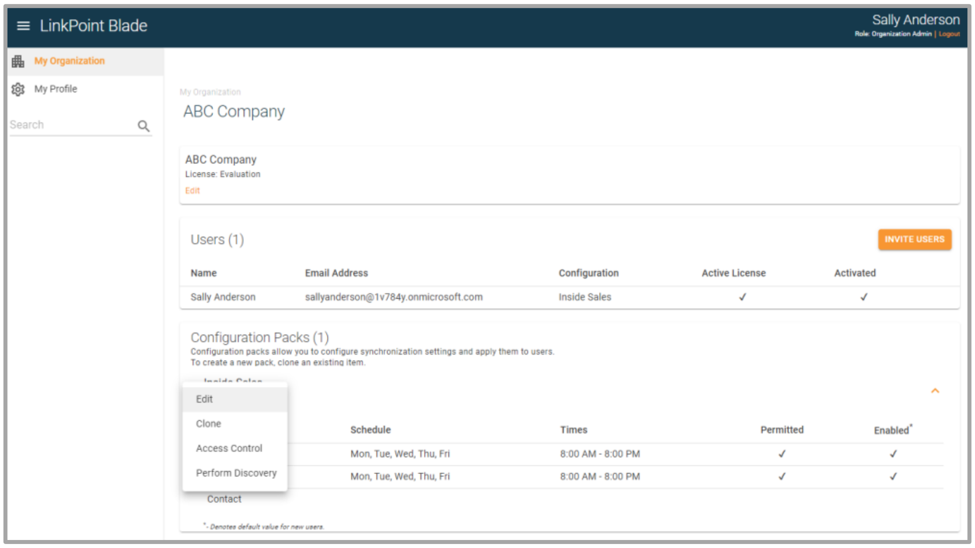


Basic Settings	
Is Permitted	Enables or disables contact sync for all users in the Configuration Pack
Is Enabled	Runs contact sync automatically in the background
Synchronize 'Private' Items	Determines whether contacts marked Private should be synced
Rebuild History	
Consecutive Errors	Determines how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

Cloning and Creating Additional Configuration Packs

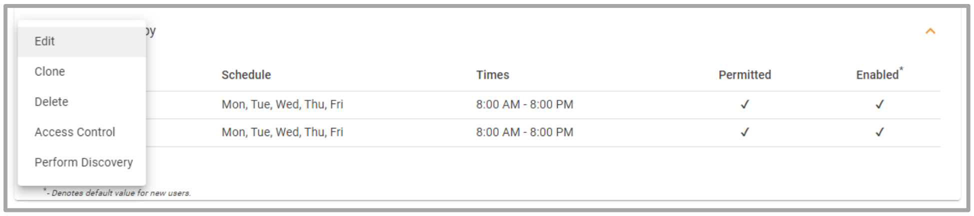
Tip: With an initial Configuration Pack set up, you can quickly and easily create new Configuration Packs via cloning and adjust the settings for other user groups.

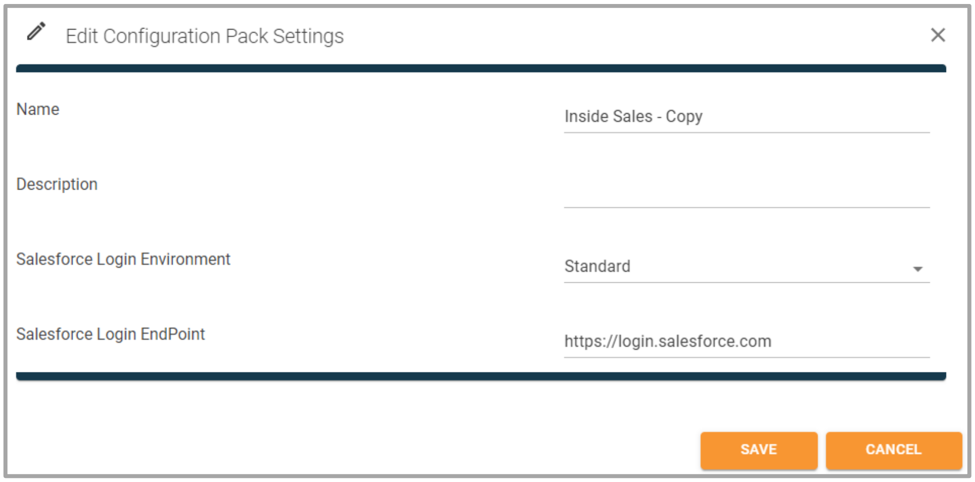
1. Click the menu icon next to **Default Configuration**, and select **Clone** from the list.



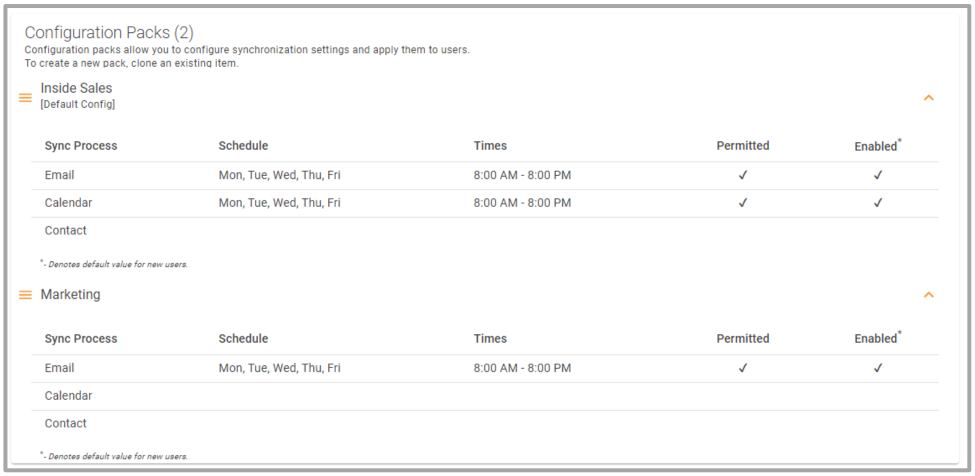
2. Click **Yes** to confirm and clone the existing Configuration Pack.

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





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



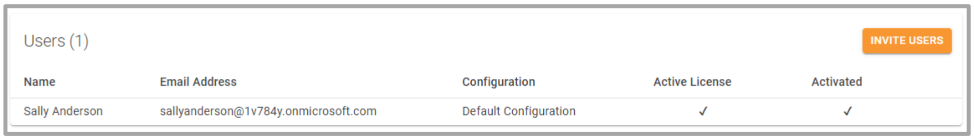
Inviting End Users to LinkPoint Blade

Tip: It is recommended that Organization Admins:

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

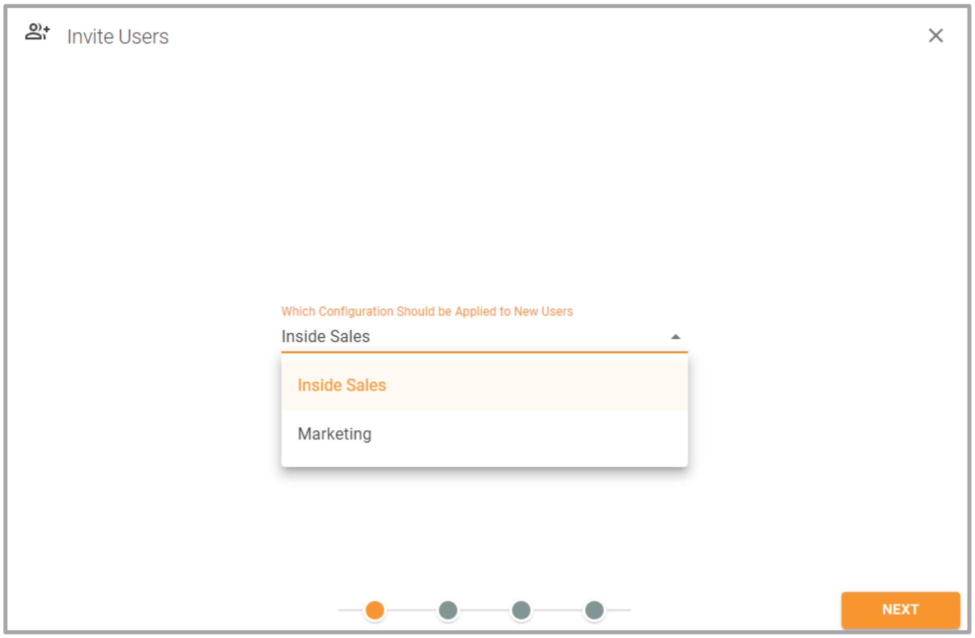
BEFORE inviting users to LinkPoint Blade. Once a user is invited, they will receive an email invitation to download and set up their instance of LinkPoint Blade, and any preconfigured settings you have established will take immediate effect.

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



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

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

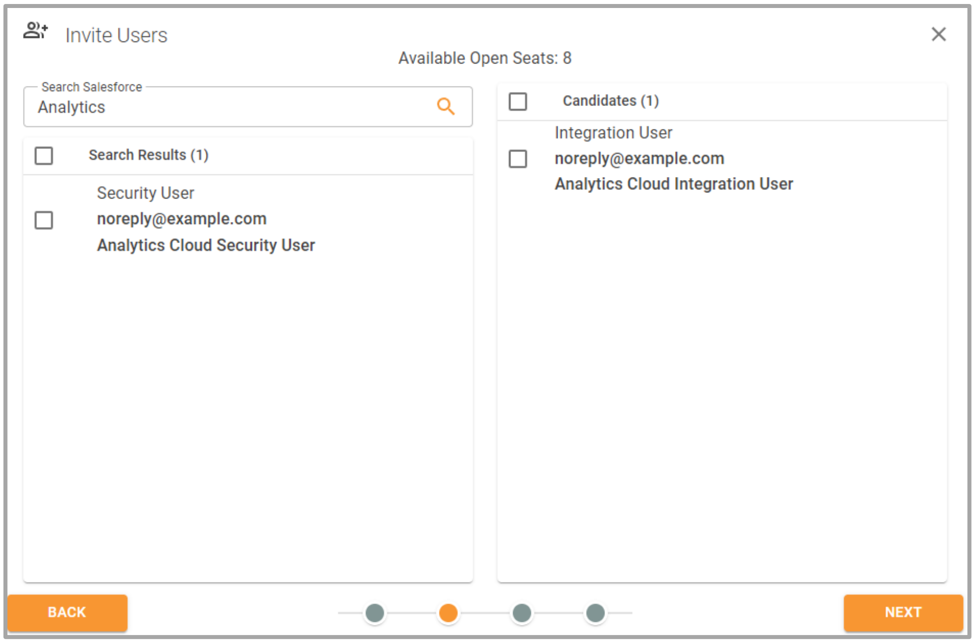


3

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

4

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

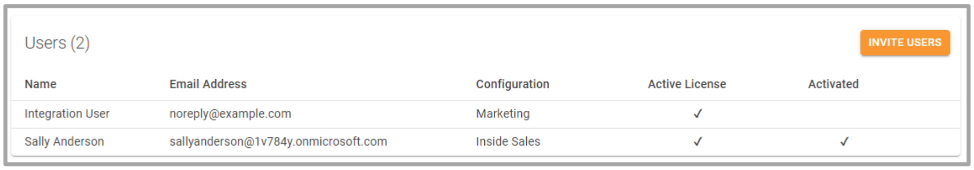


5

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

6

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


Users (2)

INVITE USERS

Name	Email Address	Configuration	Active License	Activated
Integration User	noreply@example.com	Marketing	✓	
Sally Anderson	sallyanderson@1v784y.onmicrosoft.com	Inside Sales	✓	✓

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