

LinkPoint Blade Individual Instance User Guide

Table of Contents

OVERVIEW	3
<i>LinkPoint Blade</i>	3
INSTALL	4
<i>Installing LinkPoint Blade for Desktop and Webmail</i>	4
SET UP	5
<i>Authenticate with Salesforce</i>	5
<i>Edit Preferences</i>	8
VIEW DATA	11
<i>Display the Side Panel</i>	11
<i>View Salesforce Data in Outlook</i>	12
<i>Configure Display and Search Settings</i>	15
RECORD EMAILS	17
<i>Record an Email to Salesforce</i>	17
<i>Record an Attachment to Salesforce</i>	21
<i>Create a Follow Up in Salesforce</i>	23
<i>Edit Recorded Emails</i>	25
CREATE AND EDIT SALESFORCE RECORDS	28
<i>Create Salesforce Records with SnapForms</i>	28
<i>Edit Salesforce Records with SnapForms</i>	30
SYNC EMAILS	31
<i>Initiate Background Email Sync</i>	31
SYNC CALENDAR EVENTS	32
<i>Choose a Calendar Sync Mode</i>	32
<i>Record Events with SnapRecord</i>	34
<i>Establish Calendar Auto Sync Settings</i>	38

Overview


LinkPoint Blade

LinkPoint Blade streamlines data entry and access to Salesforce by enabling users to view data in Outlook instantly. Users can record inbound and outbound emails to Salesforce with just a few clicks. SnapForms provide access to create or update Salesforce records based on the user's Salesforce permissions and setup. LinkPoint Blade includes options for one-click and auto sync for calendar events. Robust configuration options let users and administrators control how data is recorded, viewed, updated, and synced.

LinkPoint Blade works seamlessly with your Outlook on your mobile phone, tablet, webmail, or desktop and across PC and Mac.

Install

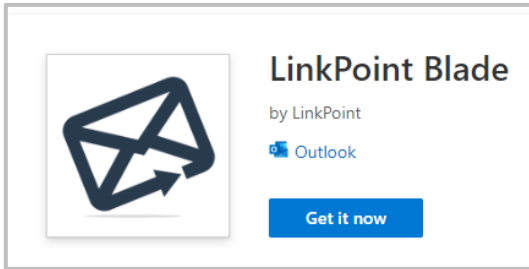
Installing LinkPoint Blade for Desktop and Webmail

 **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.

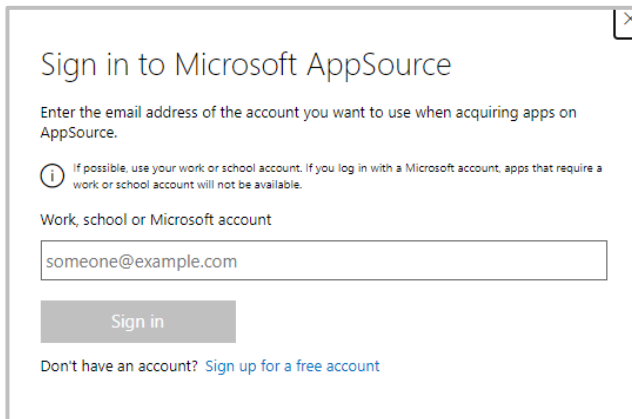
Note that LinkPoint Blade is designed for Outlook compatibility and will not run on third-party mail applications.

1 Visit Microsoft Appsource to access the LinkPoint Blade download using [this link](#).


2 Click the **Get it now** button.



3 Sign in to Microsoft Outlook, if prompted.



4 Proceed through the installation prompts and allow the requested permissions.

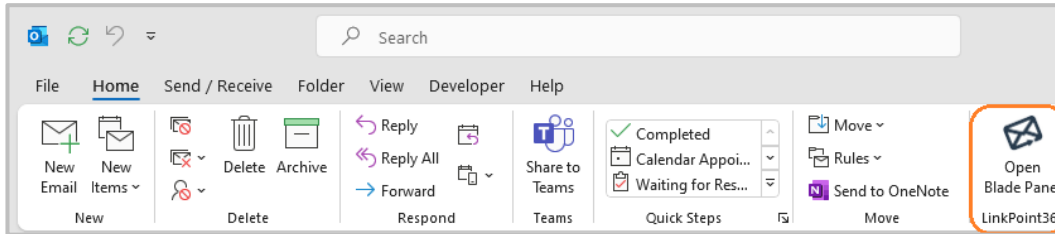
 **Tip:** If you receive a Microsoft admin consent error, then you need to contact your Office 365 Admin to approve the use of LinkPoint Blade in your organization.

Set Up

Authenticate with Salesforce

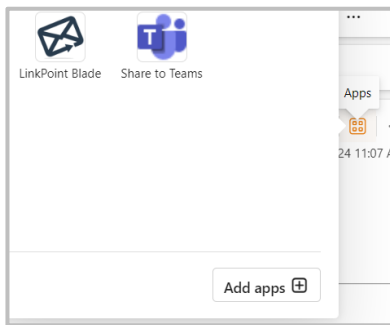
1a

Desktop Outlook users on PC and Mac: Click the Open Blade Panel button on the Outlook toolbar to expand the Side Panel.

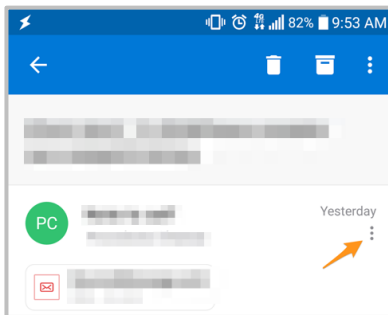


1b

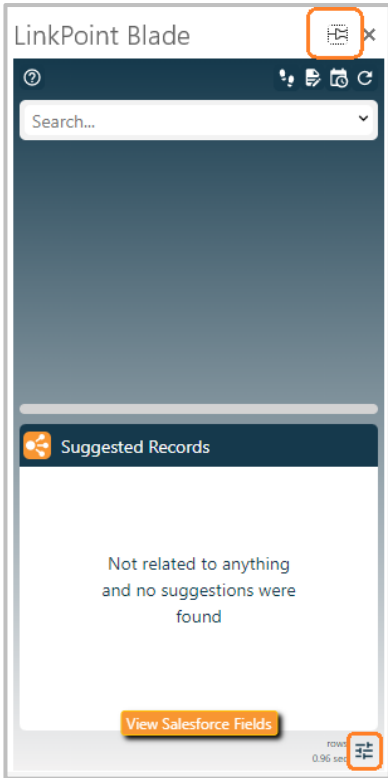
Office 365 users on the web: Open any email in your inbox and click the menu icon or Apps icon. Then, click the LinkPoint Blade icon to expand the Side Panel.



Tip: The user experience is similar for those working from the Outlook app on mobile. Select an email, tap on the menu icon, and choose LinkPoint Blade to launch the Side Panel and interact with Salesforce.



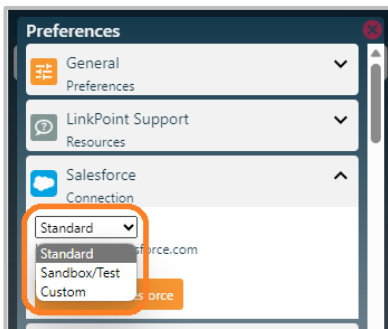
2 Click the **Preferences** icon in the bottom-right of the Sidebar.



Tip: Click the **Pin** icon in the top-right of the Sidebar to keep the Add-In open. This prevents having to relaunch the Sidebar each time you select an email.

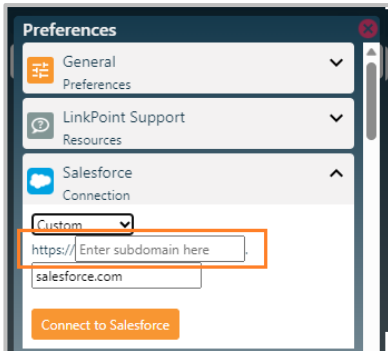
3 Select your connection URL to Salesforce from the drop-down menu.

- Standard – login.salesforce.com
- Sandbox/Test – test.salesforce.com
- Custom – example: companyname.mysalesforce.com (This is the URL you use to login into salesforce from a browser.)



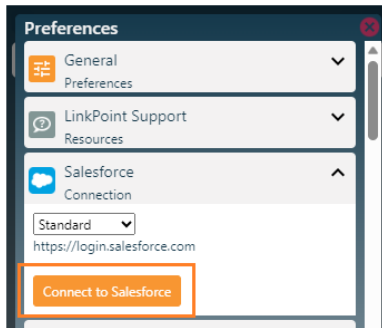


Tip: If you are using the custom option, enter your organization's company URL information below. Please note that "https://" and "salesforce.com" is already prepopulated.



4

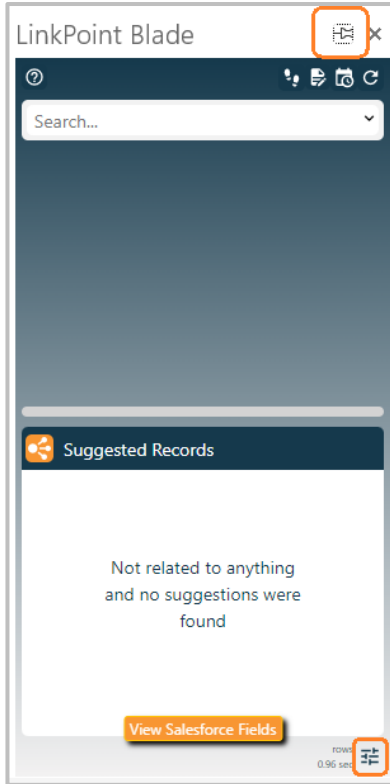
Click the **Connect to Salesforce** button to authenticate with Salesforce. Once authenticated, you will see a confirmation status.



Edit Preferences

1

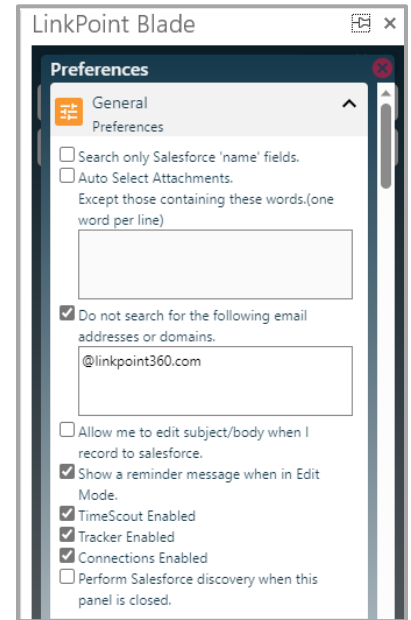
Click the **Preferences** icon in the bottom-right corner of the Side Panel to launch the Preferences Pane.



2

Expand the **General Preferences** section for the Side Panel and review the available settings. Note that some options are enabled by default. Select or deselect the checkboxes as needed to make changes.

- **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.
- **Auto Select 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 into the text box with one item on each line. This setting is enabled by default with the user's email address populated.
- **Allow me to edit subject/body when I record to salesforce:** Select this option to allow email Subject and Body content to be changed when recording emails to Salesforce. This setting is disabled by default.
- **Show a reminder message when in Edit Mode:** Select this option to show a message when composing an email reminding the user that emails will not be recorded to Salesforce until a sync occurs.
- **TimeScout Enabled:** Select this option to turn on TimeScout, the LinkPoint360 meeting scheduling tool.
- **Tracker Enabled:** Select this option to turn on Tracker, the LinkPoint360 email tracking tool.
- **Connections Enabled:** Select this option to turn on Connections, the LinkPoint360 feature that displays contact and lead data found in email signatures that do not already exist in Salesforce.
- **Perform Salesforce discovery when this panel is closed:** Select this option to force LinkPoint Blade to check Salesforce for updates to objects and fields. This will refresh SnapForms and SnapFields. This setting is disabled by default, but LinkPoint Blade 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 filter 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.

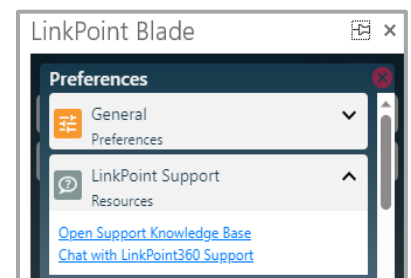


Tip: The option to exclude based on email address(es) and domain(s) is especially useful for excluding the user or others in the organization from the Search Results.

3

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

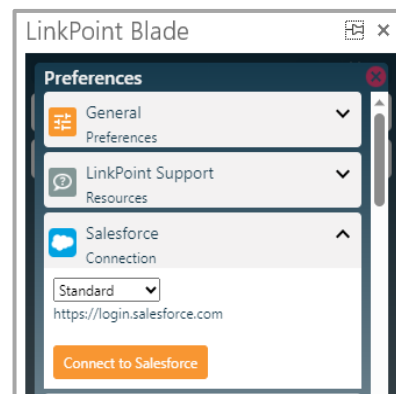
- **Open Support Knowledge Base:** Select the link to launch the LinkPoint360 Knowledge Base webpage where you can find help documents and browse Frequently Asked Questions.
- **Chat with LinkPoint360 Support:** Select the link to launch a support chat window (available during standard business hours).



4

Expand the **Salesforce Connection** section to connect to Salesforce.

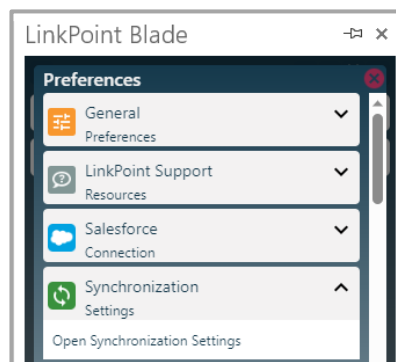
- **Choose type of Salesforce instance to connect to:** Select 'Standard', 'Sandbox/Test' or 'Custom' depending on the type of Salesforce instance that you are connecting to.
- **Connect to Salesforce:** Click this button to display the login screen for Salesforce. Note that when a connection is already established the panel will show a message indicating the Salesforce user that is connected. A "Disconnect" button will also be displayed so that, if needed, the connection to Salesforce can be disabled.



5

Expand the **Synchronization Settings** section to configure email and calendar sync.

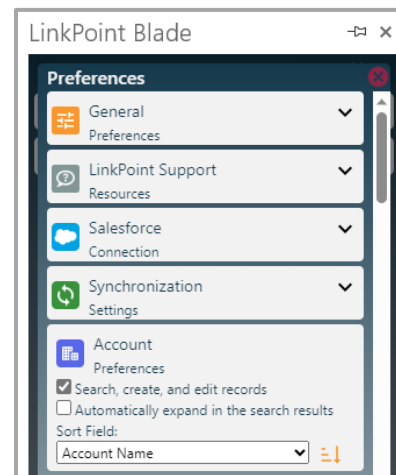
- **Open Synchronization Settings:** Opens the LinkPoint Blade configuration portal. Here you can set email and calendar synchronization preferences.



6

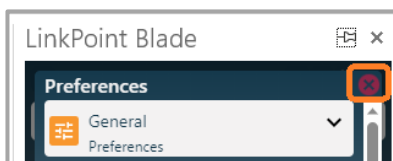
Click the **Expand** icon for the listed object group in the Preferences Pane. Note that the list of available objects will vary by user.

- **Search, create, and edit records:** Enable an object as a SnapForm and allow records for the object to appear in 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 in search results.
- **Sort Field:** Select the field that you want to sort the object's data by.



7

Click the red x icon in the top-right corner to close the Preferences Pane.



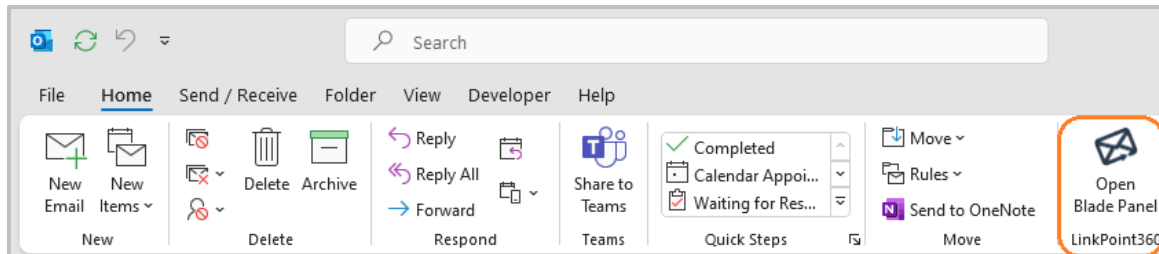
View Data

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 opened or closed to allow for extra space.

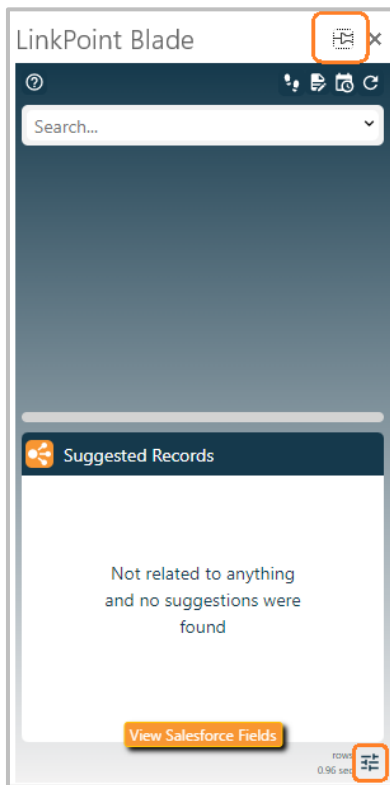
1

Click the **Open Blade Panel** button on the Outlook toolbar to expand the Side Panel.



2

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



Tip: Click the Pin button in the top-right of the Sidebar to keep the sidebar open. This prevents having to relaunch the Sidebar each time you select an email.









View Salesforce Data in Outlook

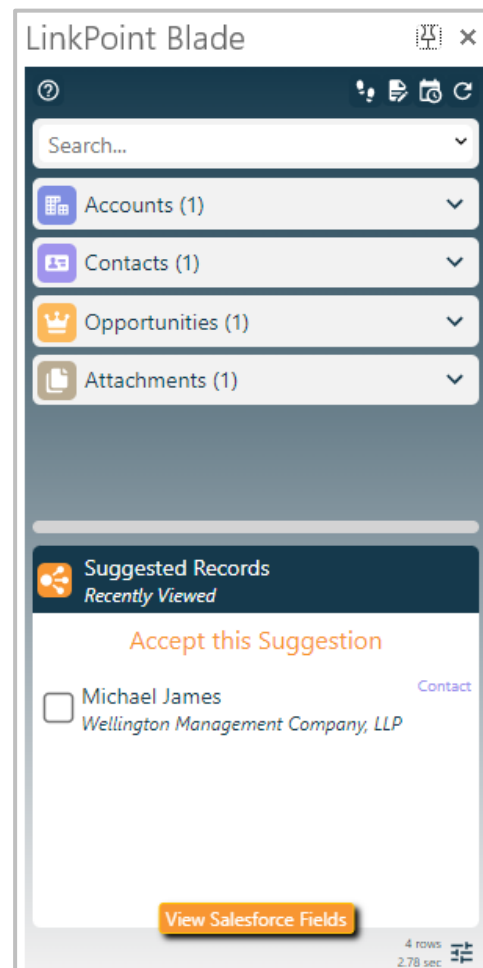
View Salesforce records based on sender and/or recipient email addresses or dynamic search. The Side Panel provides an area to create or edit data, record emails, view record details, and take additional action on Salesforce records.



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.

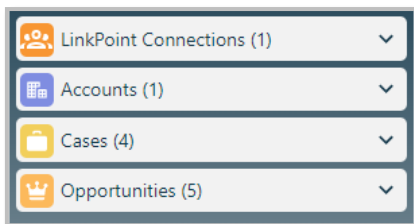
Icon	Name	Action
	Resources & Help	Access help articles, videos, and release documentation
	LinkPoint Tracker	Display LinkPoint Tracker pane
	Create New Records	Create a new Salesforce record in a SnapForm
	LinkPoint TimeScout	Displays LinkPoint TimeScout options
	Refresh	Reset the Search Results
	Search	Search for records in Salesforce
	Preferences	Adjust Side Panel display and email recording preferences
	Pin	Pin the Side Panel so it remains open to search



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 by the search for that object.

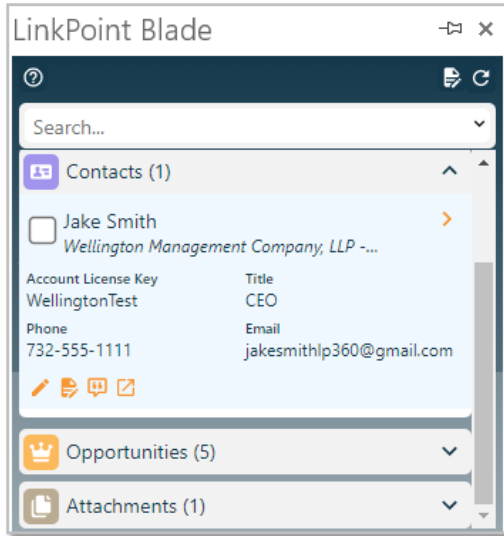


Tip: The maximum number of records that can be returned for an object in the Search Results is 99. If more than 99 items in Salesforce match the search requirements, consider adding more keywords to the search to narrow down the results. Users can also view the Record Details for a Snapshot and review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



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 Record	Create a new Salesforce record in a SnapForm
	Append Comment	Append comment to the Salesforce description field
	Open Record	Launch the record in Salesforce via a web browser

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 several default settings. In some cases, display and search options can be modified by users or Salesforce admins.



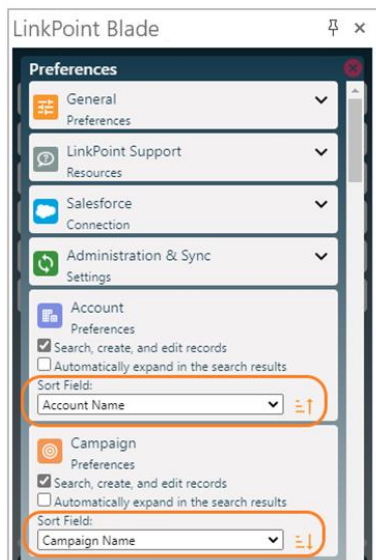
Additional Resources: Users can further refine the Salesforce objects and fields included throughout the Side Panel in the Preferences Pane. Refer to the **Edit Preferences** section of this User Guide for more information.

Sort Field & Order


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.

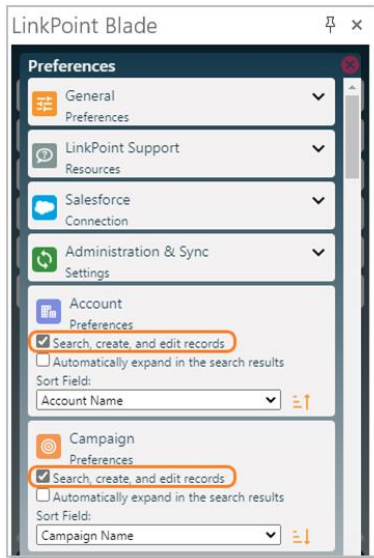
Click the **Preferences**  icon to view all SnapShots for an object in the Search Results.

Select the sort field and sort order to set the 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.



Record Emails

Record an Email to Salesforce

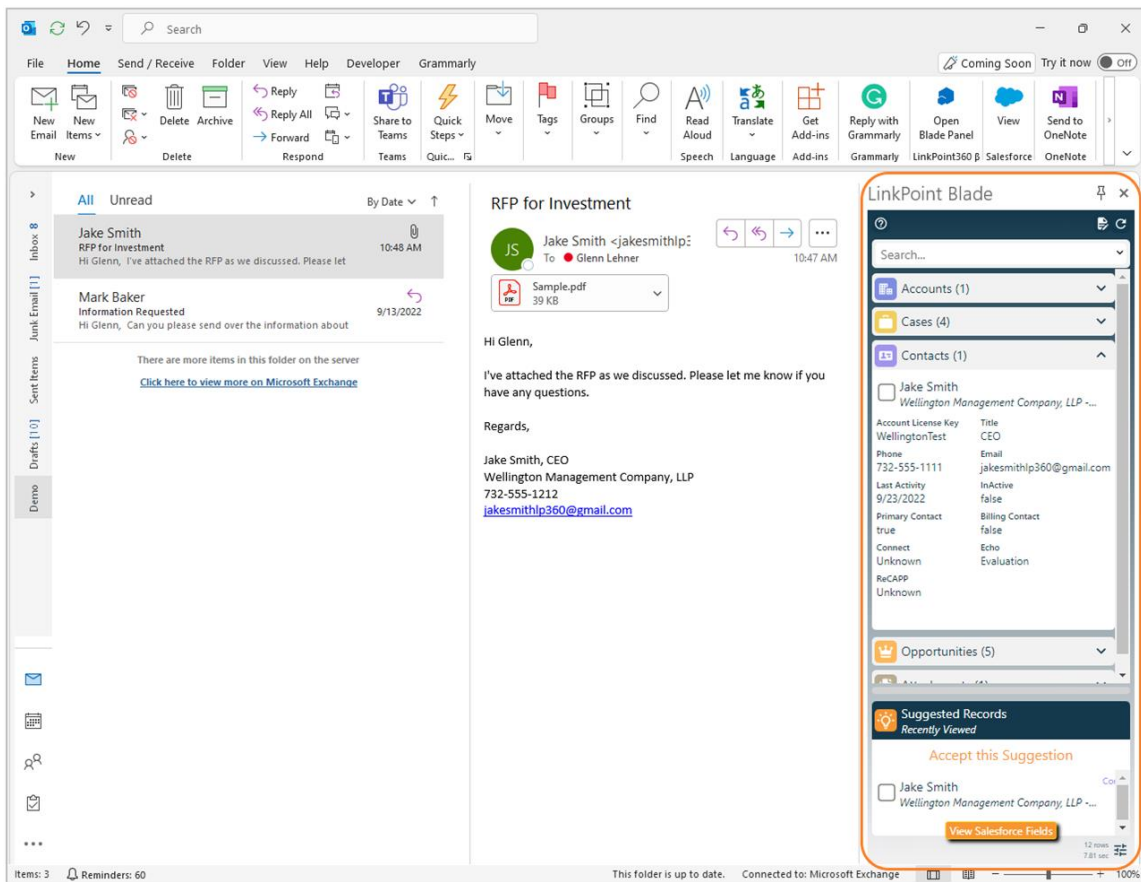
Record emails to Salesforce directly from the Side Panel in Outlook. The process is the same for inbound and outbound emails.



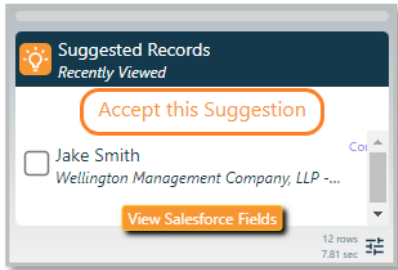
Tip: Inbound emails will be recorded in real time when Relate to Salesforce selections are made. Outbound emails may take up to 15 minutes to be recorded in Salesforce. If needed, you can also run the instant sync which will start the email synchronization. Refer to the **Initiate Email Background Sync** section of this User Guide for more information.

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.

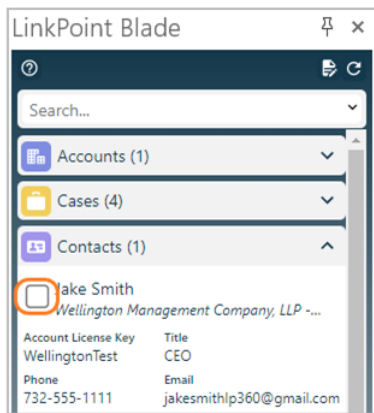


2 Select the option to **Accept This/These Suggestions** in the **Suggested Records** section to record the email to all of the listed suggested records.



Tip: LinkPoint Blade 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.

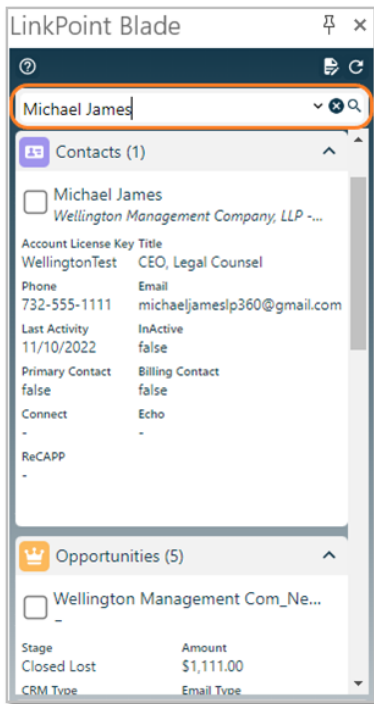
3 Select the **Relate to Salesforce** checkbox next to records in the Search Results to record the email to the selected record.



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

4

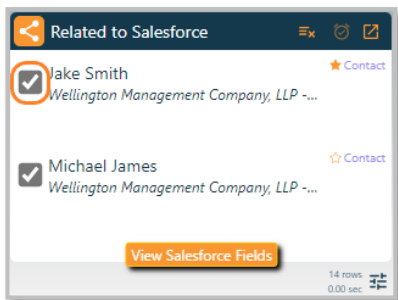
Enter text in the **Search** field, and press **Enter** or click the **Search** icon to search for additional records.



Tip: The Side Panel Search Bar will retain the last 10 terms entered for faster search access. Users can click the **v** icon in the Search Bar to select a previous search term.

5

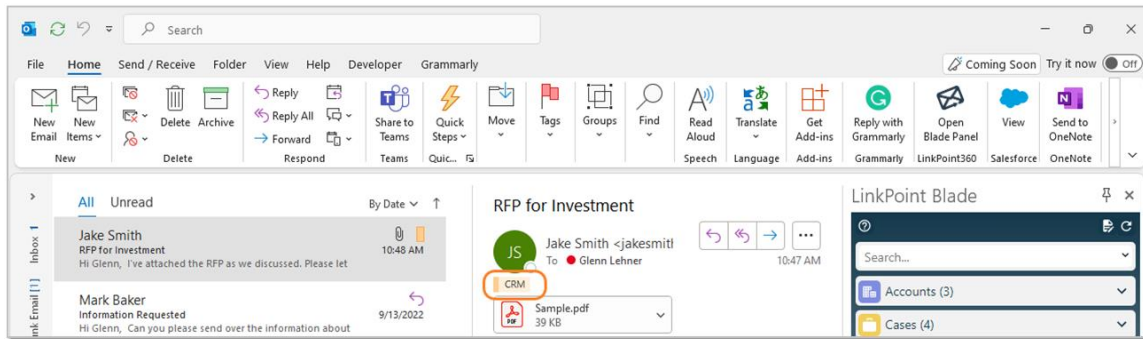
Deselect the **Relate to Salesforce** checkbox to disassociate the email from a selected record. Unchecking all of the selections will remove the email from Salesforce.



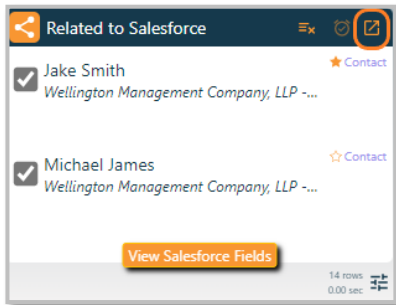
Tip: Some SnapShots in the Side Panel may not include a checkbox to relate the item to a Salesforce record. The option to Relate to Salesforce only appears when working with a supported Outlook item (i.e. email, calendar event, or task).



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.

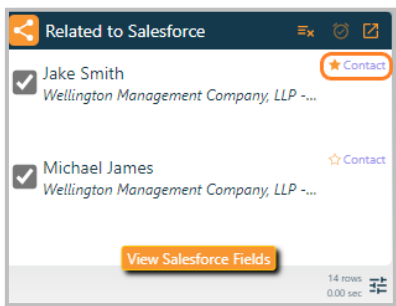


Tip: To view the recorded email, click the **Open Record** icon in the Related to Salesforce header. This will open the email as a completed task in Salesforce in a web browser.



6

Change the Primary Contact for the recorded email if selecting multiple Contact records in the Side Panel. Note that the first Contact selected is automatically designated as the Primary Contact and is indicated with a solid orange star icon. Click the outline star for a different selected Contact in the Related to Salesforce list to change the Primary Contact.



Tip: Primary Contact selection is only supported for Salesforce orgs where the option to “Allow Users to Relate Multiple Contacts to Events” is enabled. Primary Contact designation allows users to choose the best Contact to align a recorded item with in Salesforce when the item is related to multiple records. This enhances reporting metrics and ensures that data is allocated with accuracy for orgs with the “relate multiple contacts” setting enabled. Follow up Tasks created from recorded emails automatically associate to the selected Primary Contact.

Record an Attachment to Salesforce

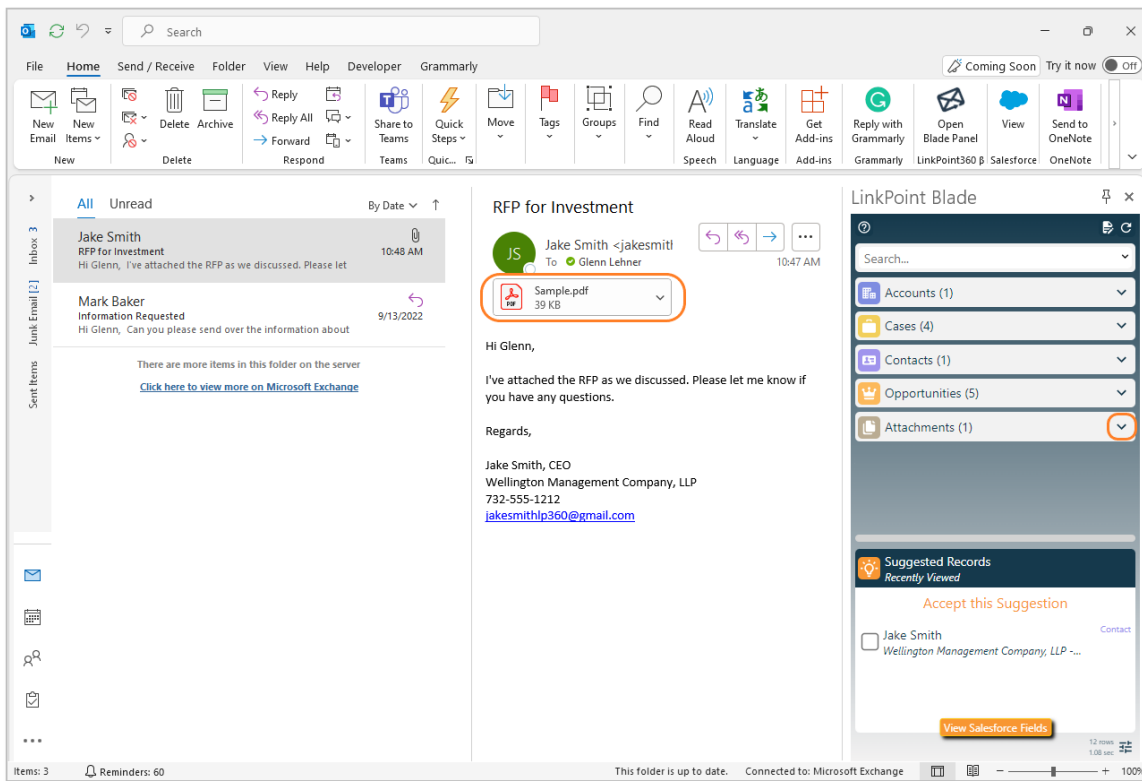
Record attachments on inbound or outbound emails to Salesforce using the Side Panel. Attachments are saved to either the Notes & Attachments or Files object in Salesforce as a single item and related to multiple records, depending on the user's Salesforce configuration.



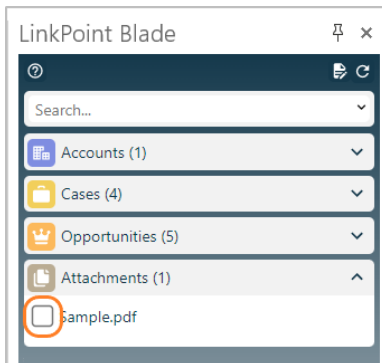
Additional Resources: Users can preconfigure default behavior for recording Attachments in the Preferences Pane. Refer to the **Edit Preferences** section of this User Guide for more information.



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.

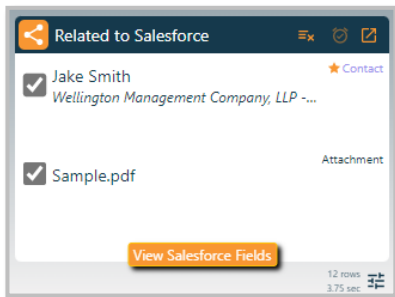


- 2 Select the record(s) to relate the email to in Salesforce. Then click the Attachments checkbox for the attachment.

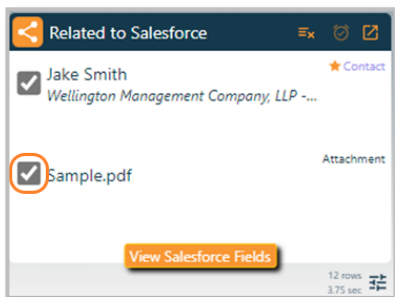


Tip: Users must select at least one record to relate the email to in Salesforce before the attachment can be recorded.

- 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.



Create a Follow Up in Salesforce

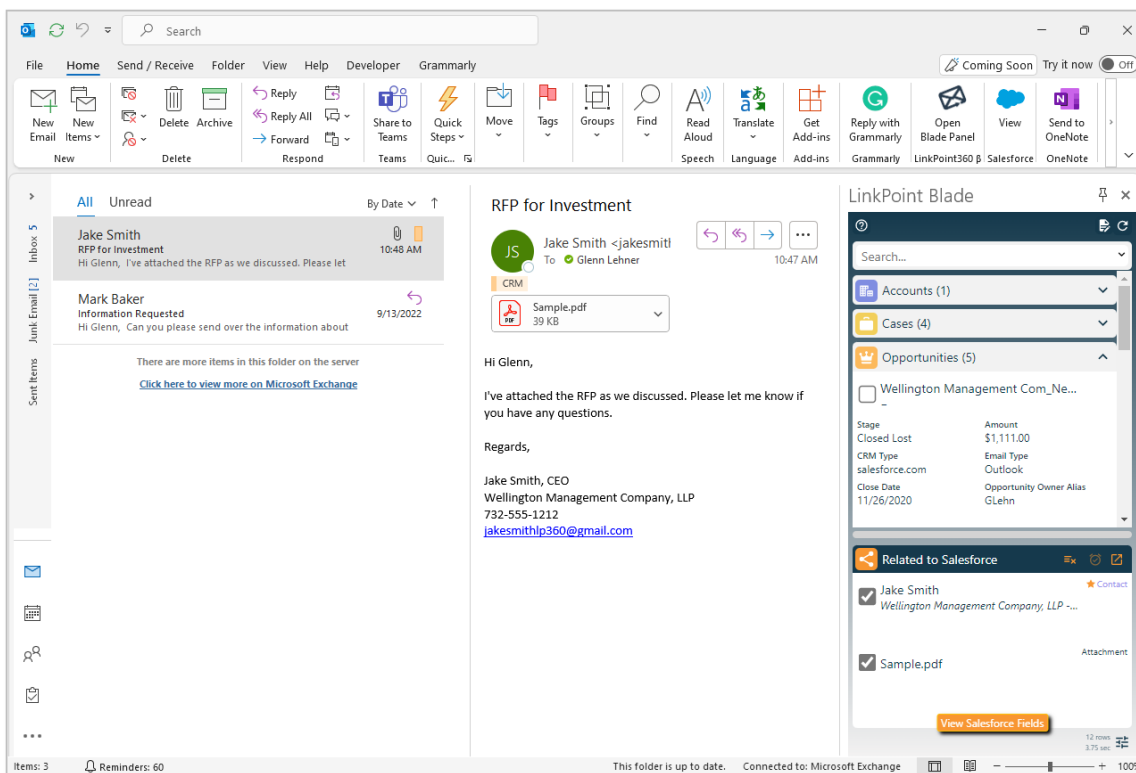
Create a follow up as a task in Salesforce from Outlook. This helps users plan next steps while interacting with people via email. The process is the same for inbound and outbound emails. Enable calendar and/or task sync to move follow up items from Salesforce to Outlook.



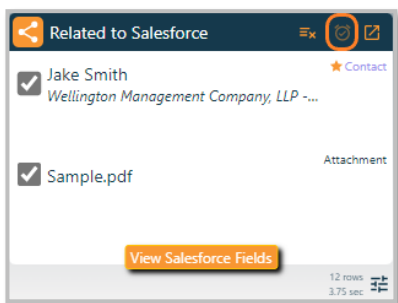
Additional Resources: Refer to the **Establish Calendar Auto Sync Settings** sections of this User Guide for more information.



1 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.

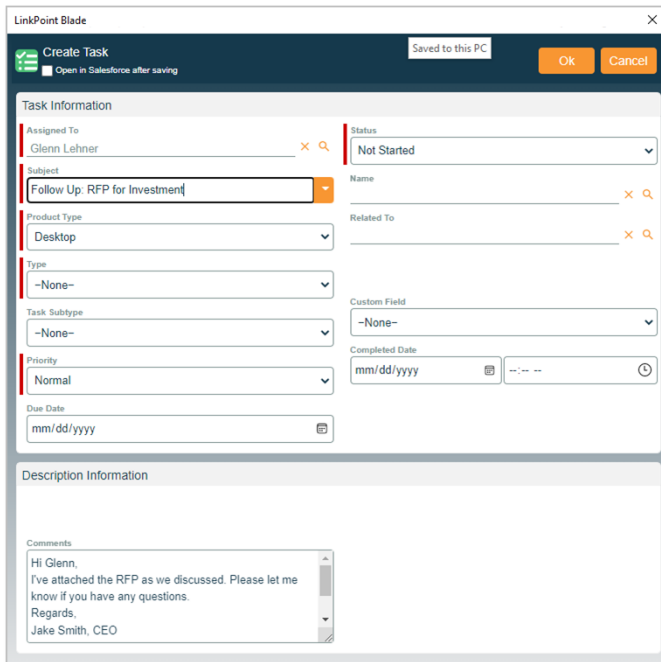


2 Click the **Follow Up** icon in the **Related to Salesforce** section in the Side Panel. Note the icon color is a dull orange indicating that a follow up has not been created yet.



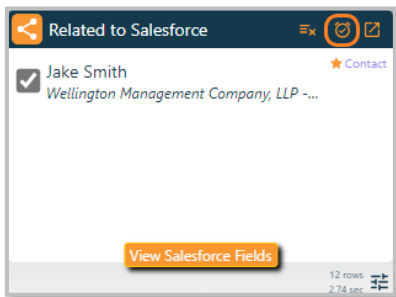
3

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 **OK** button 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.



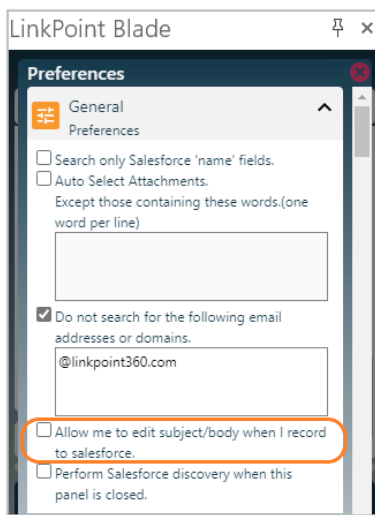
Edit Recorded Emails

LinkPoint Blade users are able to edit the email Subject and Body details recorded to Salesforce without altering the message sent to a recipient. This helps users relabel items as part of an email chain with more accurate descriptions for reference and reporting. Users can edit previously recorded inbound emails or new outbound emails using the same method.



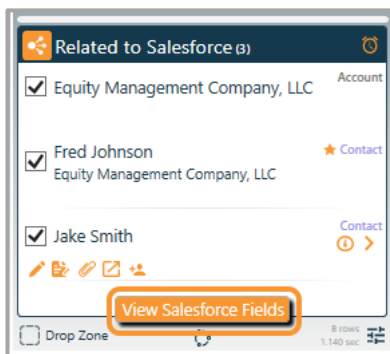
Tip: This feature is off by default. To enable the setting:

1. Open the **Preferences Pane**.
2. Expand the **General** section.
3. Select the option to “**Allow me to edit ‘Subject’ and ‘Body’ fields when I record salesforce**”.
4. Close the Preferences Pane.



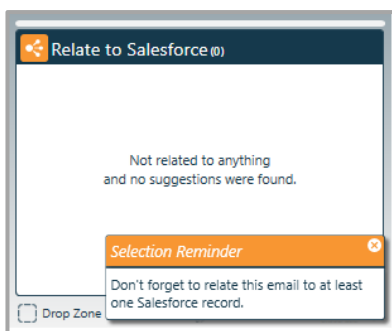
1

Select or compose an email, and click the **View Salesforce Fields** button at the bottom of the Side Panel.



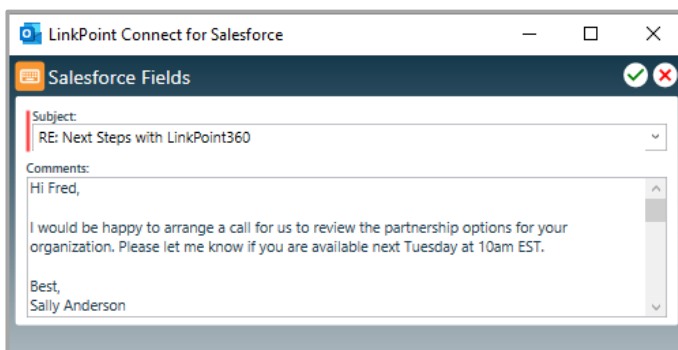


Tip: If you click View Salesforce Fields for an inbound email before relating it to Salesforce, you will be prompted to select at least one Salesforce reference before the email can be recorded.



2

Enter or edit the text in the **Subject** and **Comments** fields as needed. Note that the Comments field contains the Body of the email. Click the **OK** button when finished.



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



Tip: This will not change the content that the email recipient(s) see. These changes only affect the content that is recorded to Salesforce.

3

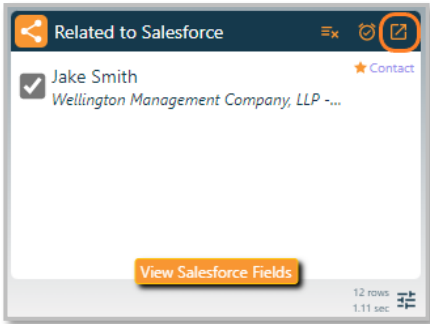
For outbound emails, send the email when ready. For inbound emails, the process is complete.



Tip: The Task fields in Salesforce will be updated with the edited content. The Task Comments will reflect the original subject and body from the email. If recording emails using Salesforce Enhanced Email, edit changes will only be reflected in the plain text version of the email in Salesforce. The HTML version of the email will not be altered within Salesforce.

4

Click the **Open related email in Salesforce** icon to view the changes in Salesforce as needed.



Create and Edit Salesforce Records

Create Salesforce Records with SnapForms

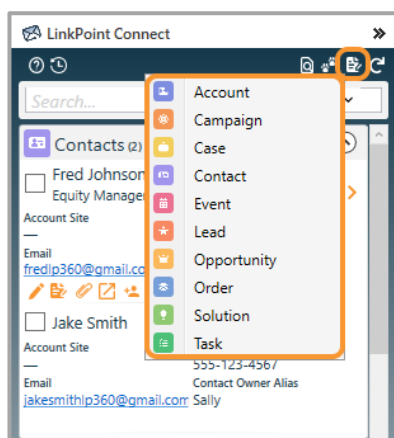
Create new records for standard and custom Salesforce objects from Outlook with SnapForms. LinkPoint Blade automatically detects the user's Salesforce objects and provides access to SnapForms for those objects. SnapForms display the fields for the object as they appear in the user's instance of Salesforce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



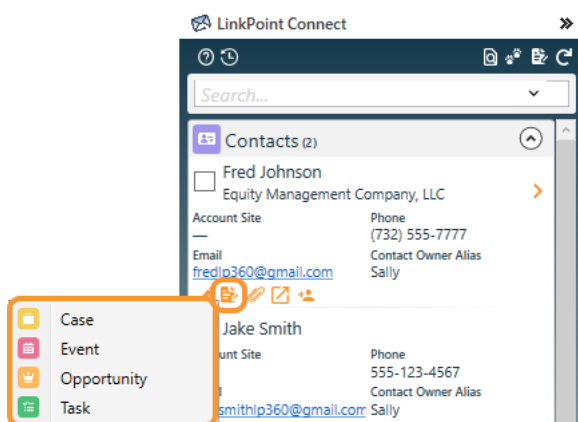
Additional Resources: Users can change the Salesforce objects available as SnapForms in the Preferences Pane. Refer to the **Edit Preferences** section of this User Guide for more information.



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.

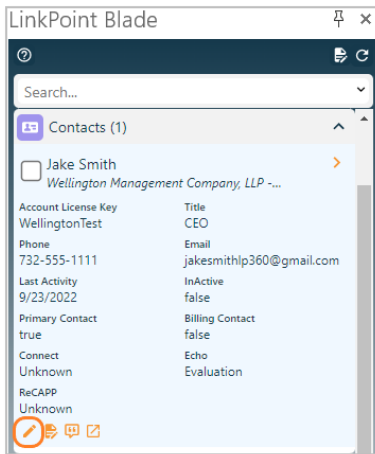


Tip: Users can select a record type for Salesforce objects, where applicable. Select the **Record Type** from the drop-down list at the top of the SnapForm. The fields on the SnapForm will change dynamically based on the selection.

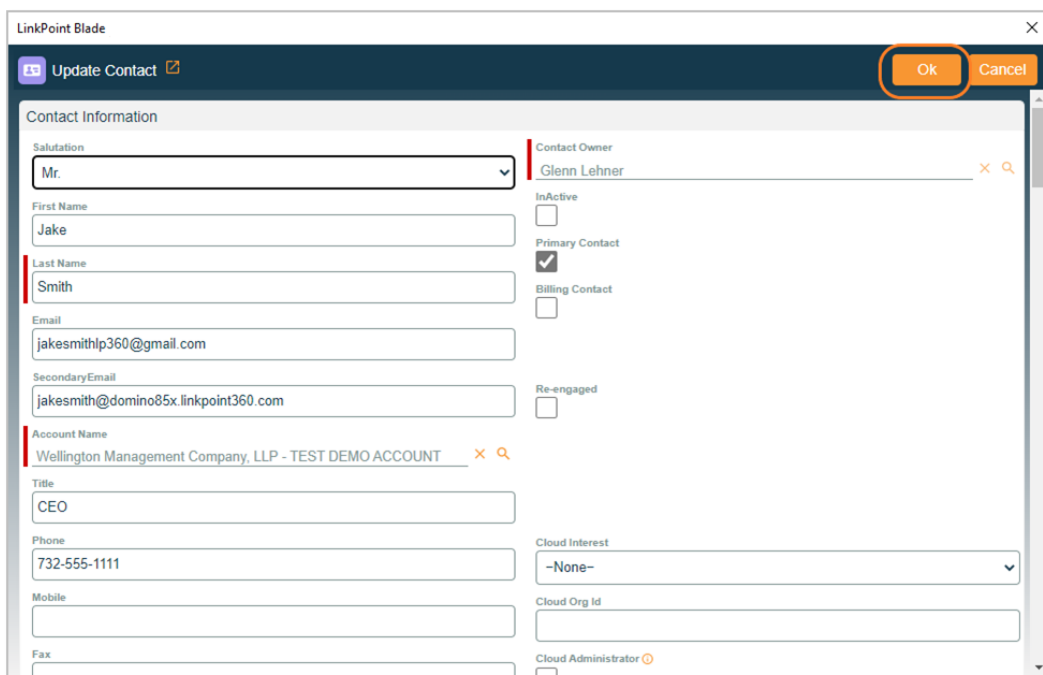
Edit Salesforce Records with SnapForms

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 **Ok** button to update the record in Salesforce.

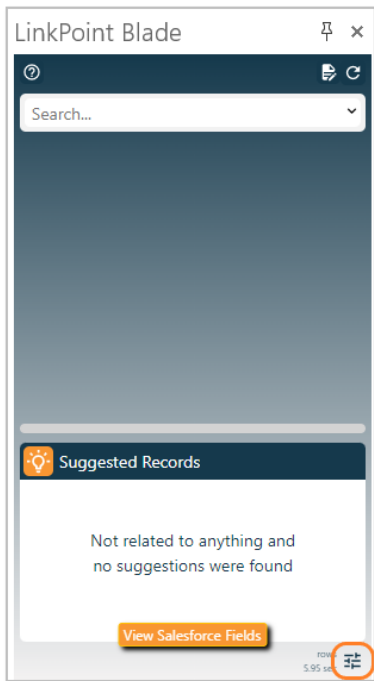


Sync Emails

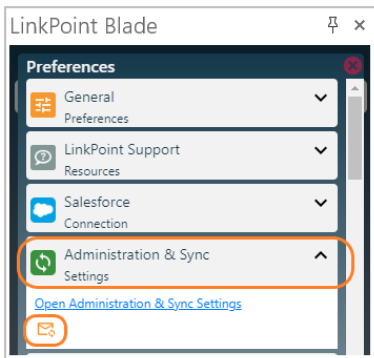
Initiate Background Email Sync

Inbound emails are recorded in real time when Relate to Salesforce selections are made. Outbound emails may take up to 15 minutes to be recorded in Salesforce. If needed, you can initiate the email sync on demand.

- 1 Click the **Preferences** icon in the bottom-right of the Sidebar.



- 2 Expand the **Administration & Sync** section and click the **Initiate Background Email Sync** icon.



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 two sync modes: SnapRecord 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 occurs. Review the available options to choose the calendar sync mode that best fits specific workflow needs.

Sync Mode	Description
SnapRecord	<ul style="list-style-type: none">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.Events canceled in Outlook after they are SnapRecorded to Salesforce are deleted from Salesforce in real time.Users cannot SnapRecord an entire recurring meeting series at once.
Auto Sync	<ul style="list-style-type: none">Auto Sync can be configured to be a one-way or bidirectional sync between Outlook and Salesforce.The sync is a background sync process that synchronizes all events every 15 to 60 minutes.Supports synchronizing recurring meeting series.

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.

Auto Sync

Preset calendar event sync to run automatically based on established rules. Users leverage sync settings in LinkPoint Preferences 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** section 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. Events canceled in Outlook after they are SnapRecorded to Salesforce are deleted from Salesforce in real time. This option is enabled by default. SnapRecord is automatically disabled if auto sync is turned on.



Tip: Users cannot SnapRecord an entire recurring meeting series at once. However, users can open a single occurrence of a recurring meeting and choose to SnapRecord the item to Salesforce. As such, the CRM Category will only appear on each single instance of recurring meetings that the user acts on with SnapRecord.

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.

The screenshot shows the Outlook 'Meeting' creation window. The title is 'Introduction to LinkPoint360'. Required attendees include 'Michael James' and 'Jake Smith'. The start time is set for Monday, 10/10/2022 at 10:30 AM Eastern Time. The end time is 11:00 AM Eastern Time. The location is 'Microsoft Teams Meeting'. The LinkPoint Blade side panel is open, displaying a search for contacts. It shows two contacts: 'Jake Smith' (CEO, Wellington Management Company, LLP) and 'Michael James' (CEO, Legal Counsel, Wellington Management Company, LLP). A 'Suggested Records' section is visible, with an 'Accept All Suggestions' button and a 'View Salesforce Fields' button.



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

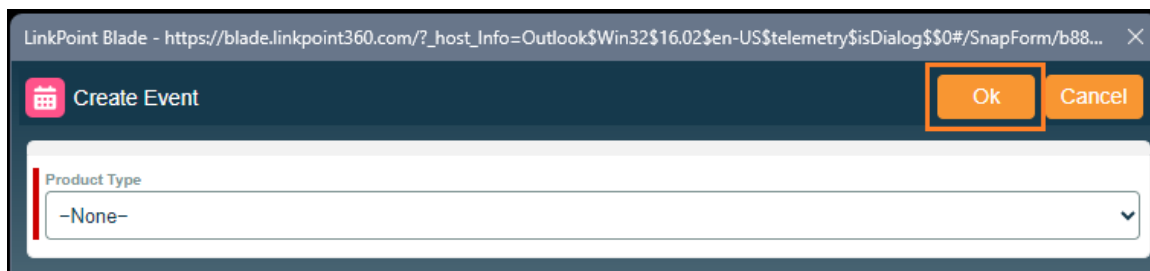
Click the **View Salesforce Fields** button in the **Relate to Salesforce** section of the Side Panel.



Tip: SnapFields are presented in the **View Salesforce Fields** window 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

Enter the values as applicable in the **Salesforce Fields** window, noting that required fields are marked in red. Click the **Ok** button when finished. The fields will be updated in Salesforce when the event is recorded.



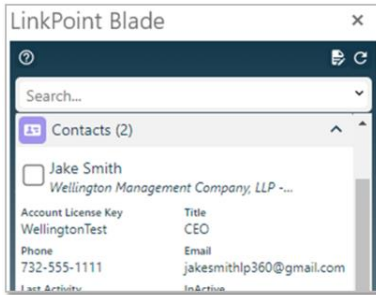
4

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.



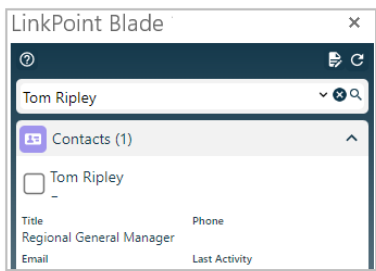
Tip: LinkPoint Blade automatically suggests contacts and leads that exist in Salesforce if they are included in the Required or Optional fields of the meeting. If there are no matching contacts or leads in Salesforce, the Relate to Salesforce section will not display any suggestions.

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



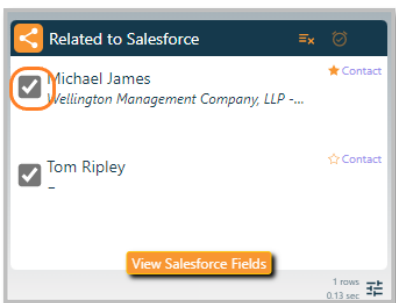
 **Warning:** Salesforce does not allow users to take action on contacts and leads at the same time. Try selecting only contacts or only leads and record the calendar event.


- 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.

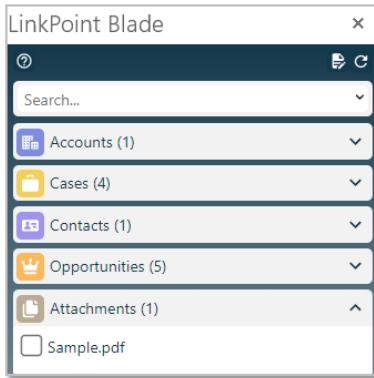
- 7 Deselect the **Relate to Salesforce** checkbox to disassociate the calendar event from a selected record. Uncheck all of the selections to remove the calendar event from Salesforce.



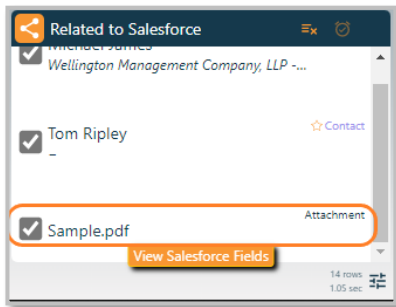
 **Tip:** Some Snapshots may not include a checkbox to relate the calendar event to a Salesforce record. The option to Relate to Salesforce only appears when working with a supported Outlook item (i.e. email, calendar event, or task). The checkbox will not appear if the Salesforce record does not support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

8

Click the **Relate to Salesforce** checkbox for event file(s) listed in the Attachments group to record the file to Salesforce along with the event contents.



Tip: 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 event is sent and SnapRecorded.

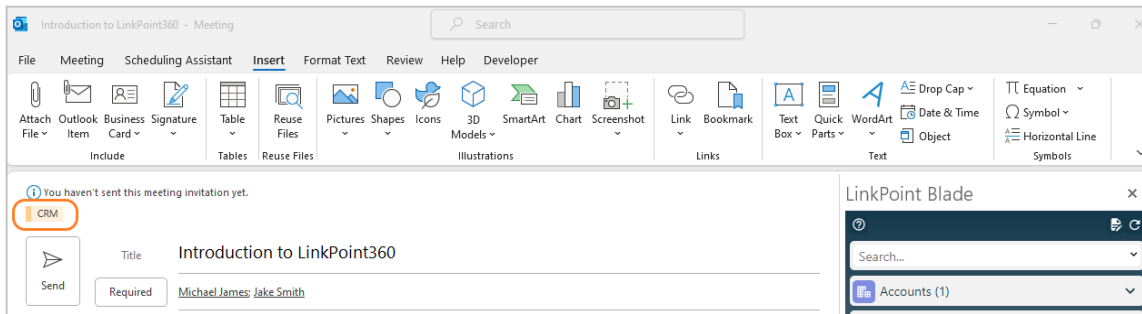


9

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 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.



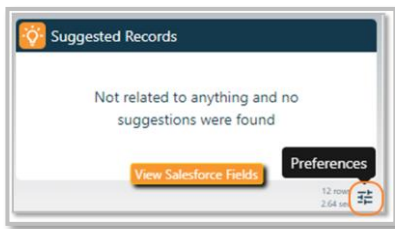
Tip: LinkPoint Blade will only sync one-to-one between a single Outlook calendar and Salesforce. This means that while users may have access to more than one Outlook calendar (i.e. personal calendar, a team or group calendar), users can only choose one calendar to sync with Salesforce. Note that if a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



Tip: LinkPoint will only sync calendar events that are related to Salesforce records via the Side Panel.

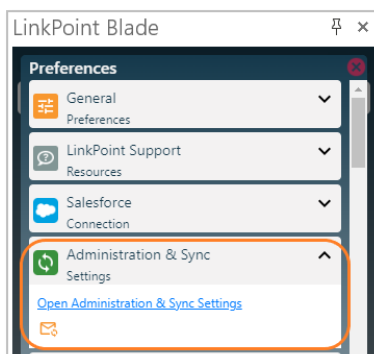
1

Click the **Preferences** icon in the Side Panel.



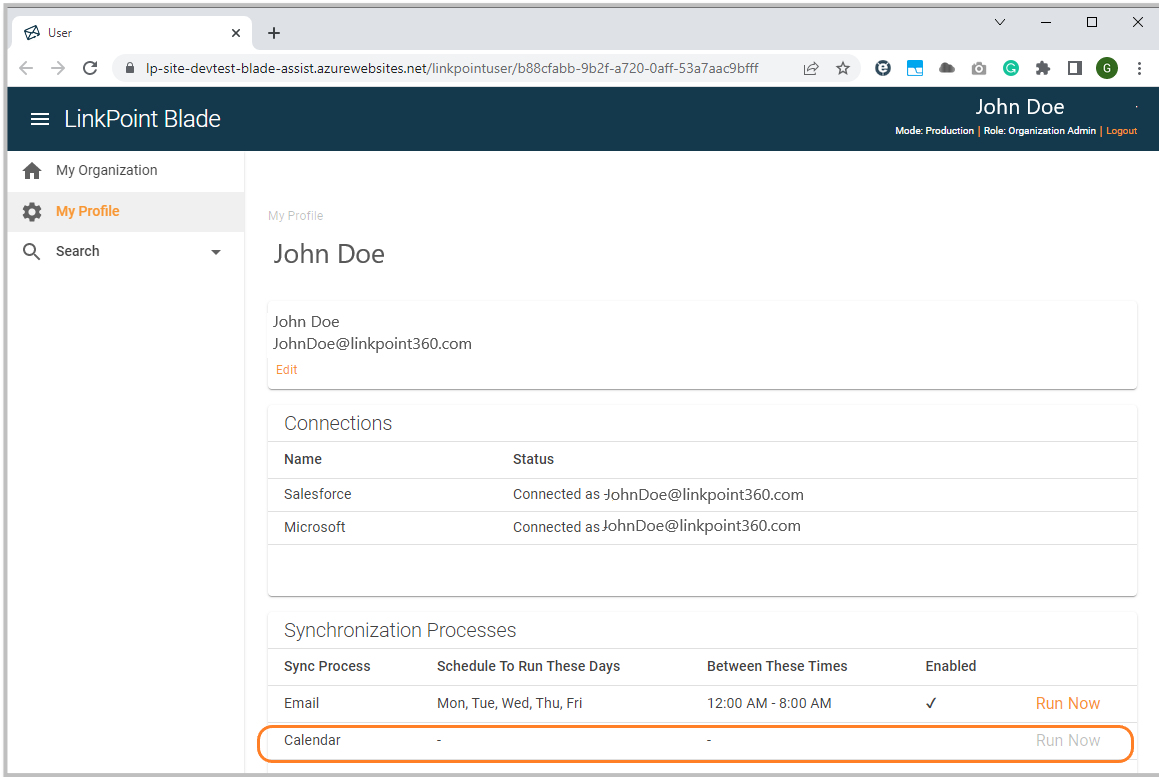
2

Expand the **Administration & Sync** section and click **Open Administration & Sync Settings**.



3

The LinkPoint Blade Configuration portal will open. Click the **Calendar Synchronization Process** to open the Calendar Synchronization settings



4

Click the **Is Enabled** option to enable or disable the Auto Synchronization then **Save**.

