LinkPoint Blade
Enterprise Instance User Guide

+1 732.212.8401 --- www.linkpoint360.com

Table of Contents

Install

Initial Enterprise Installation and Setup

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 is built on Microsoft Office Add-In Framework. This allows users to work with and create Salesforce data directly in any instance of Outlook.

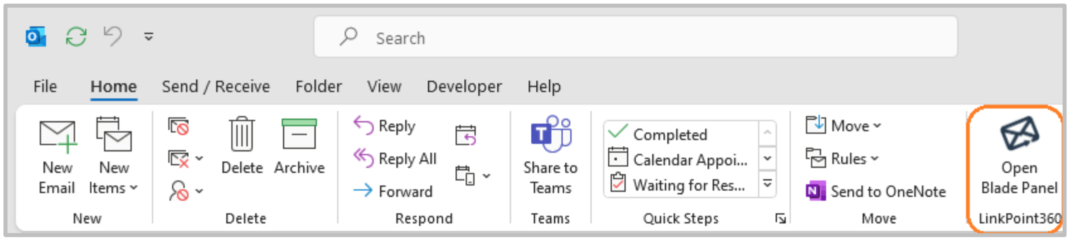
Tip: Microsoft and system admins can refer to the LinkPoint Blade Admin Setup Guide for specific instructions for how to deploy the Add-In via the Microsoft Office 365 Admin Center, how to configure global settings, and how to invite end users.

Set Up

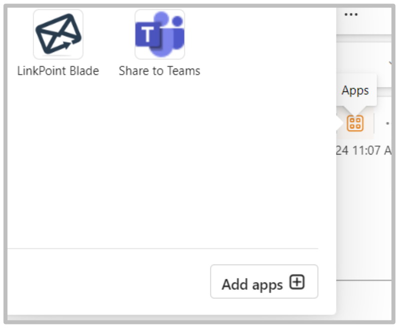
Authenticate with Salesforce

Tip: Note that while Microsoft 365 deployment is centralized for the system admin, individual users in your organization will need to enter their Salesforce credentials in order to complete the configuration.

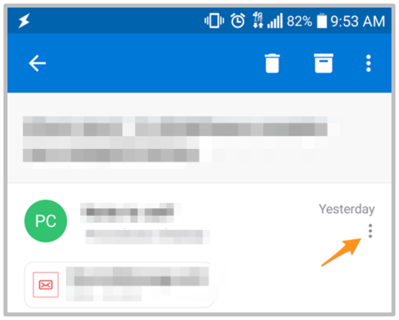
1a **Desktop Outlook users on PC and Mac:** Click the Open Blade Panel button on the Outlook toolbar to expand the Side Panel.



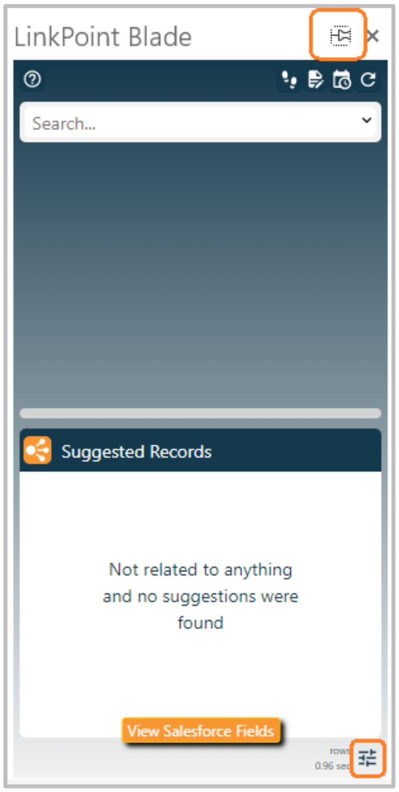
1b **Office 365 users on the web:** Open any email in your inbox and click the menu icon or Apps icon. Then, click the LinkPoint Blade icon to expand the Side Panel.



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.

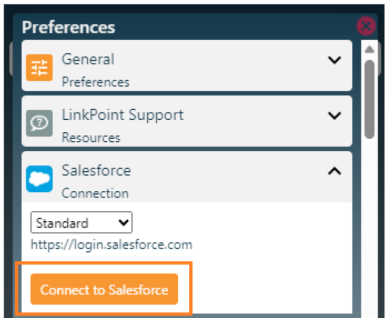


2 Click the **Preferences** icon in the bottom-right of the Sidebar.



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

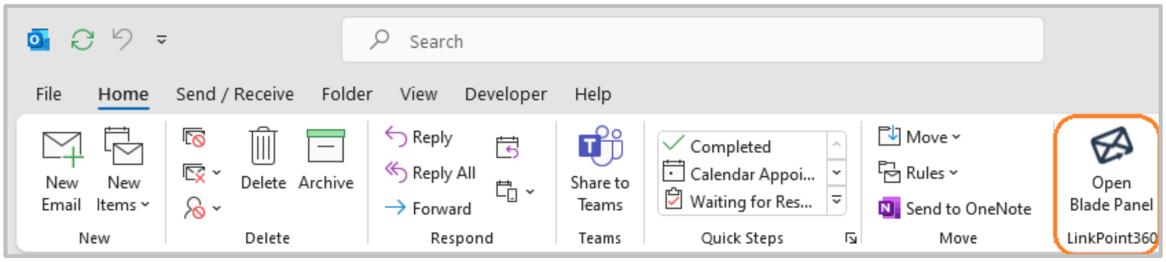


View Data

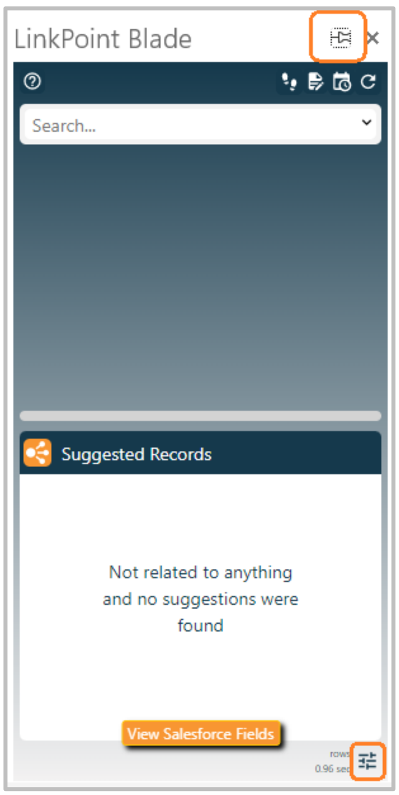
Display the Side Panel

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.

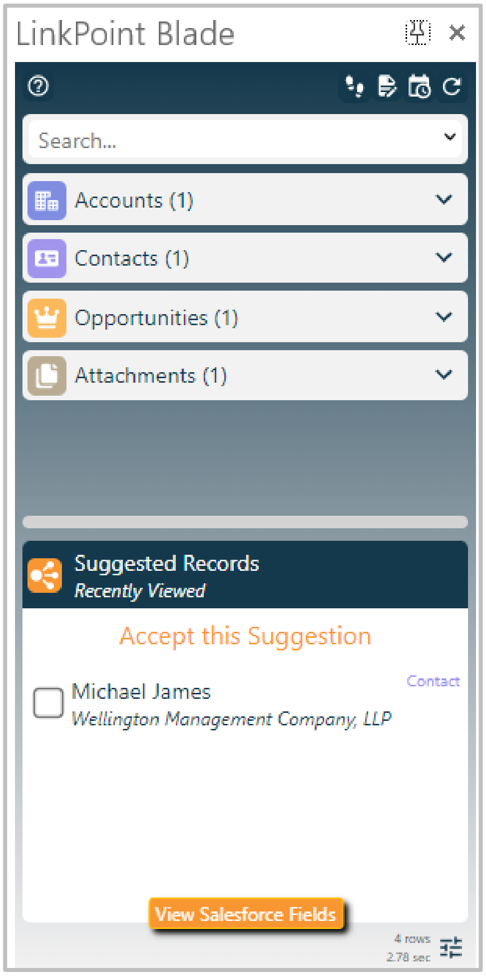
View Salesforce Data in Outlook

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.

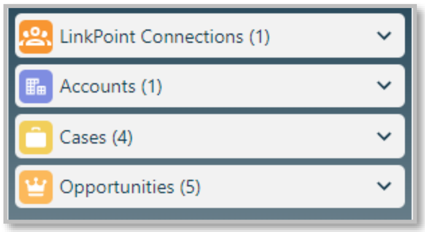
Global Icons: Use the Global Icons for general actions.

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.

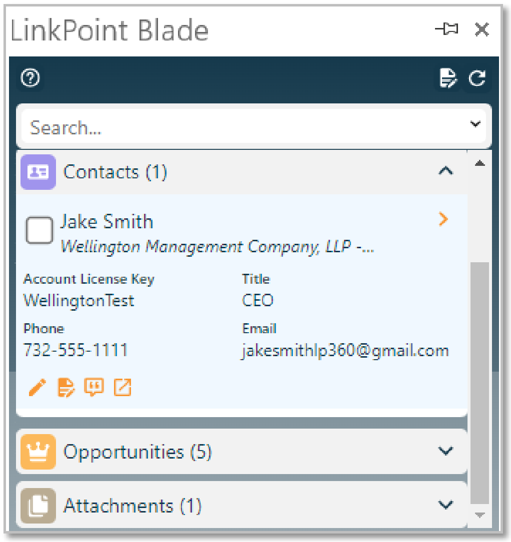
Object Groups: View records grouped in the Side Panel by Salesforce object. The number to the right of the object name indicates the number of records found by the search for that object.



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

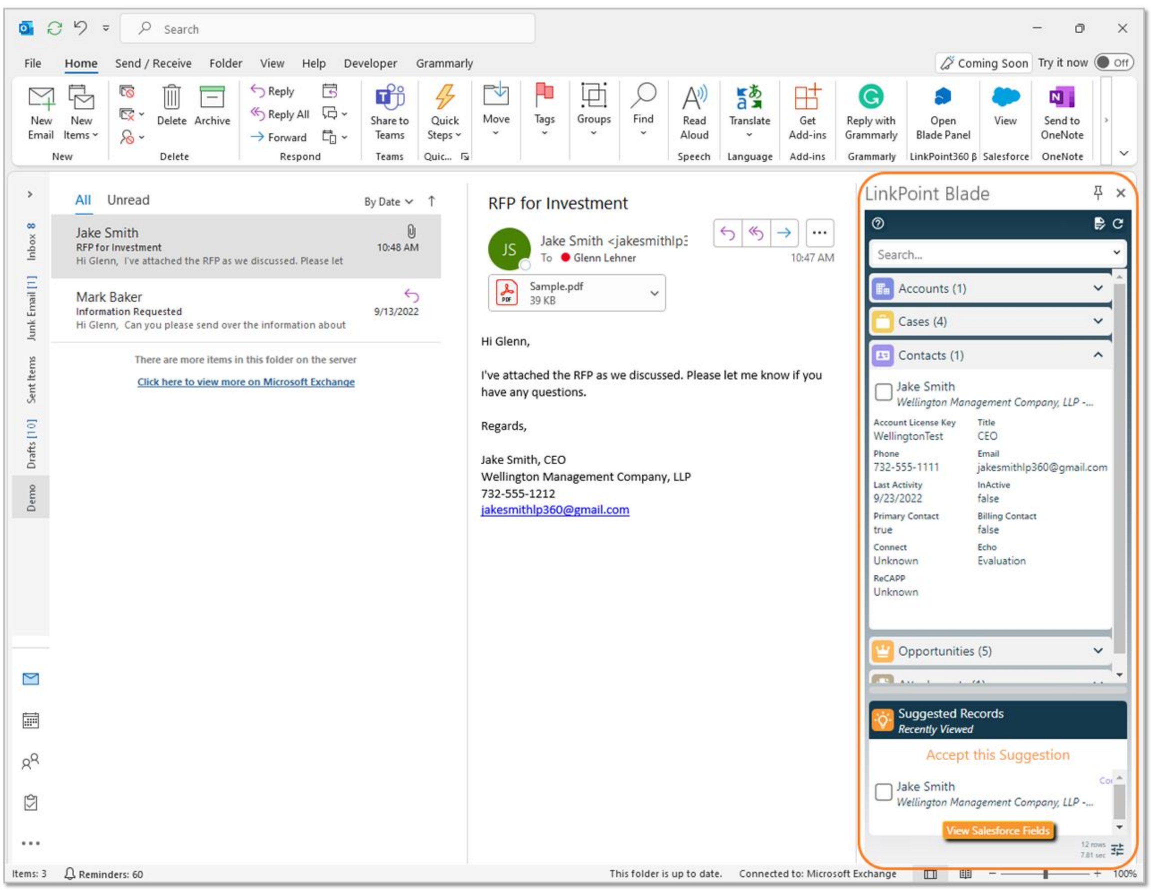
Record Emails

Record an Email to Salesforce

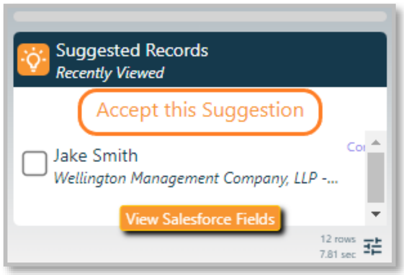
Record emails to Salesforce directly from the Side Panel in Outlook. The process is the same for inbound and outbound emails.

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.

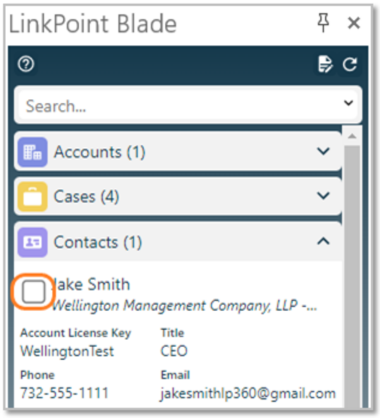


2 Select the option to **Accept This/These Suggestions** in the **Suggested Records** section to record the email to all of the listed suggested records.



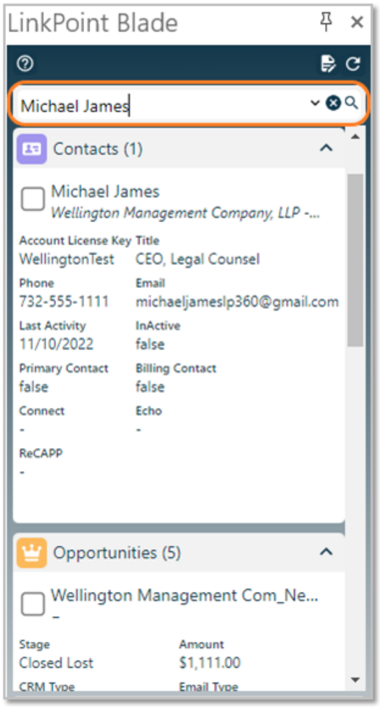
Tip: LinkPoint Blade automatically suggests contacts and/or leads in Salesforce if they are included in the To, From, Cc, or Bcc fields of the email. If there are no matching contacts or leads in Salesforce, the Relate to Salesforce section will not display any suggestions.

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



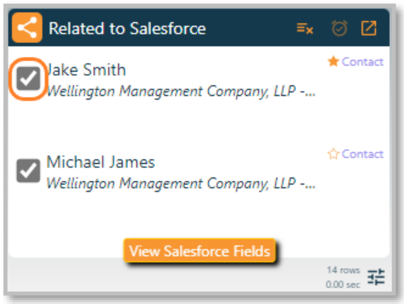
Warning: Salesforce does not allow users to associate records to contacts and leads at the same time. Try selecting only contacts or only leads and record the email.

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



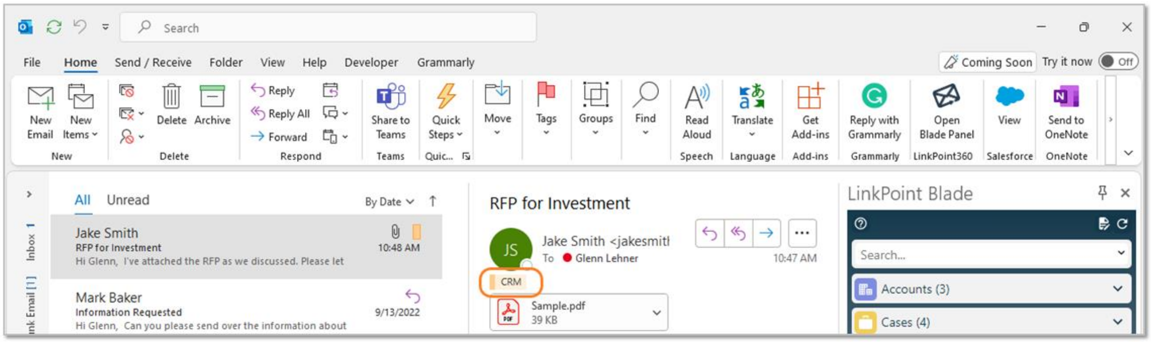
Tip: The Side Panel Search Bar will retain the last 10 terms entered for faster search access. Users can click the v icon in the Search Bar to select a previous search term.

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.

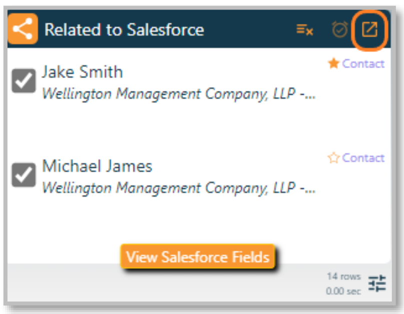


Tip: Some SnapShots in the Side Panel may not include a checkbox to relate the item to a Salesforce record. The option to Relate to Salesforce only appears when working with a supported Outlook item (i.e. email, calendar event, or task).

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.

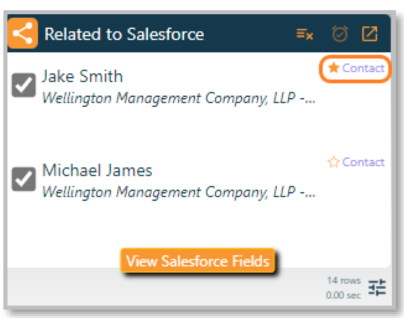


Tip: To view the recorded email, click the **Open Record** icon in the Related to Salesforce header. This will open the email as a completed task in Salesforce in a web browser.



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.



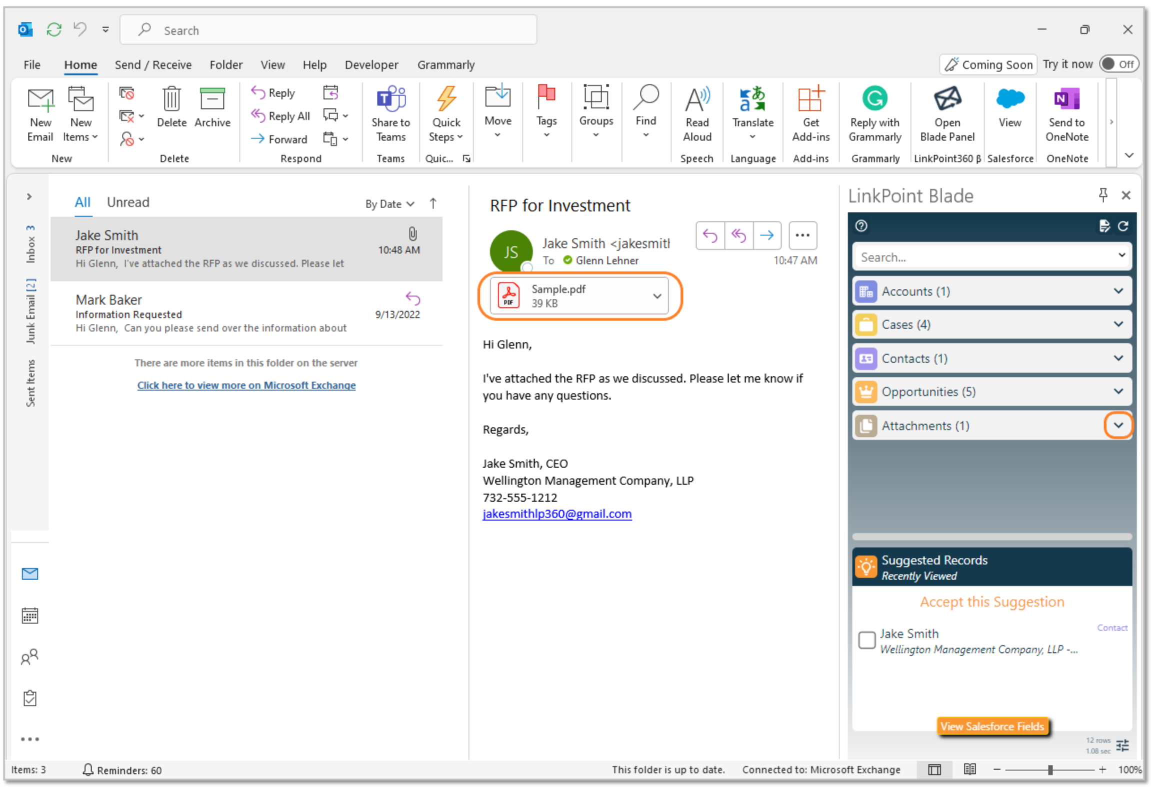
Tip: Primary Contact selection is only supported for Salesforce orgs where the option to "Allow Users to Relate Multiple Contacts to Events" is enabled. Primary Contact designation allows users to choose the best Contact to align a recorded item with in Salesforce when the item is related to multiple 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.

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.



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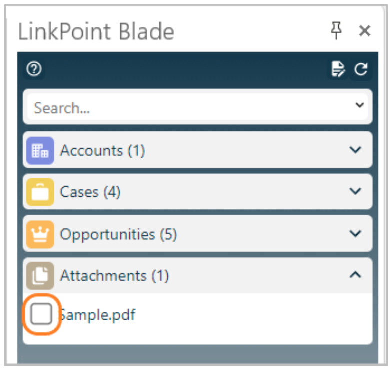
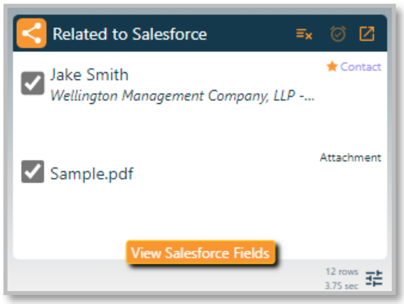
Select the record(s) to relate the email to in Salesforce. Then click the Attachments checkbox for the attachment.



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.



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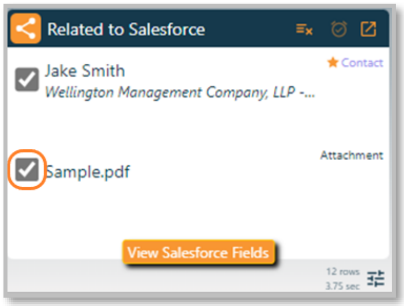
Deselect the **Related to Salesforce** checkbox to remove the attachment from Salesforce.

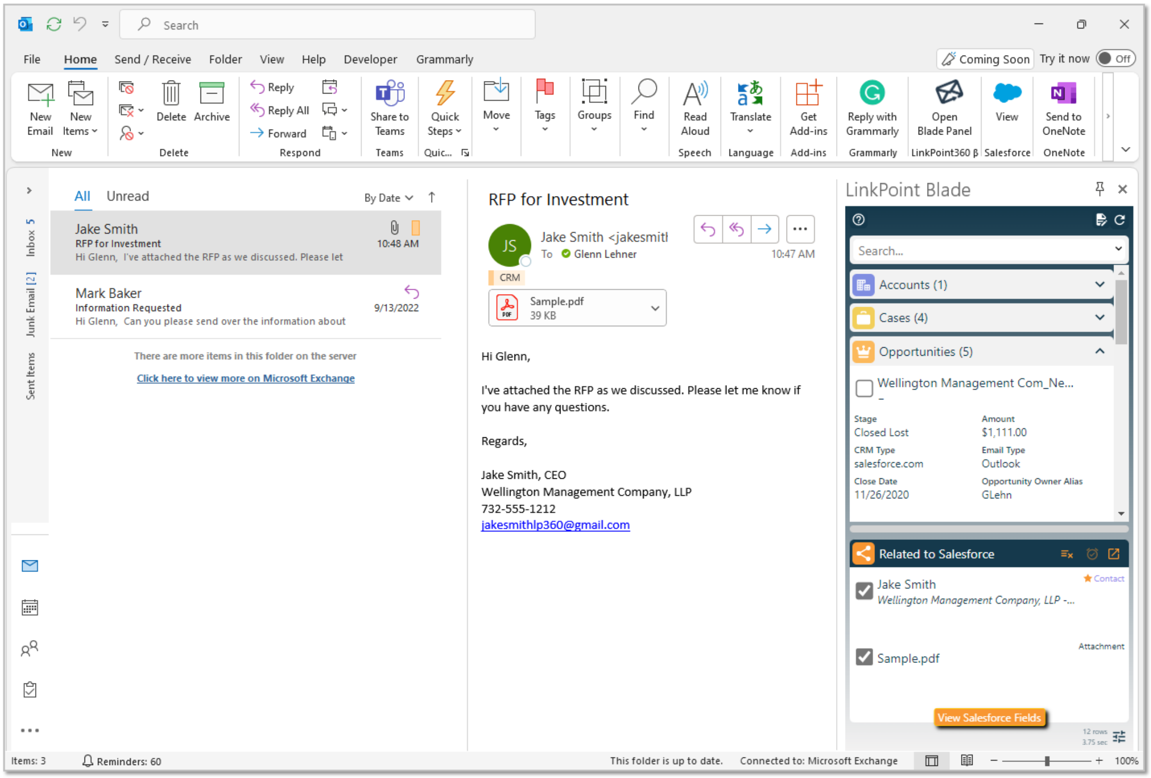


Create a Follow Up in Salesforce

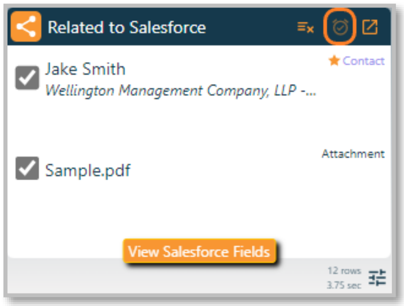
Create a follow up as a task in Salesforce from Outlook. This helps users plan next steps while interacting with people via email. The process is the same for inbound and outbound emails. Enable calendar and/or task sync to move follow up items from Salesforce to Outlook.

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

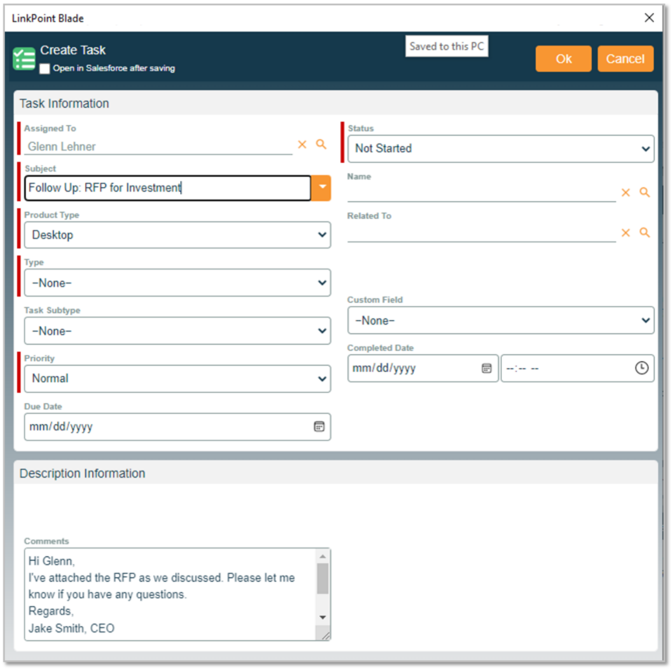
1. Select or compose an email, and select the record(s) to relate the item to in Salesforce. At least one record must be selected to create a related follow up.



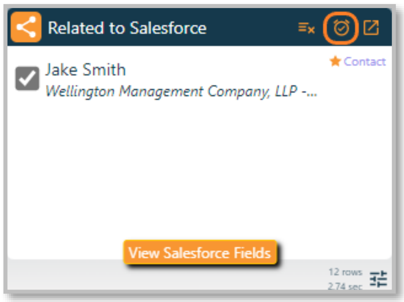
2. Click the **Follow Up** icon in the **Related to Salesforce** section in the Side Panel. Note the icon color is a dull orange indicating that a follow up has not been created yet.



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.



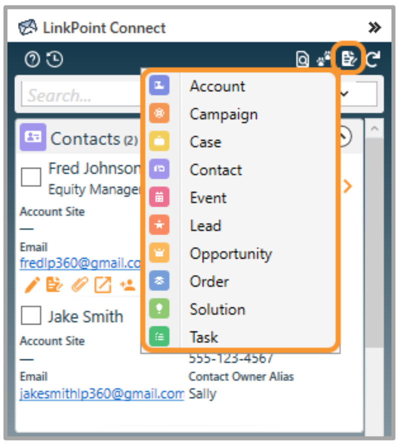
Create and Edit Salesforce Records

Create Salesforce Records with SnapForms

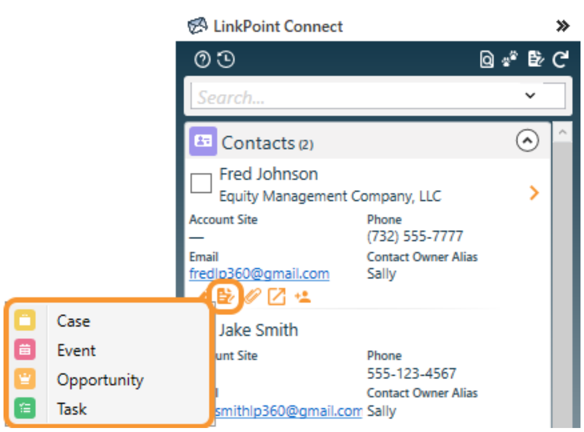
Create new records for standard and custom Salesforce objects from Outlook with SnapForms. LinkPoint Blade automatically detects the user's Salesforce objects and provides access to SnapForms for those objects. SnapForms display the fields for the object as they appear in the user's instance of Salesforce 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.

1. 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.



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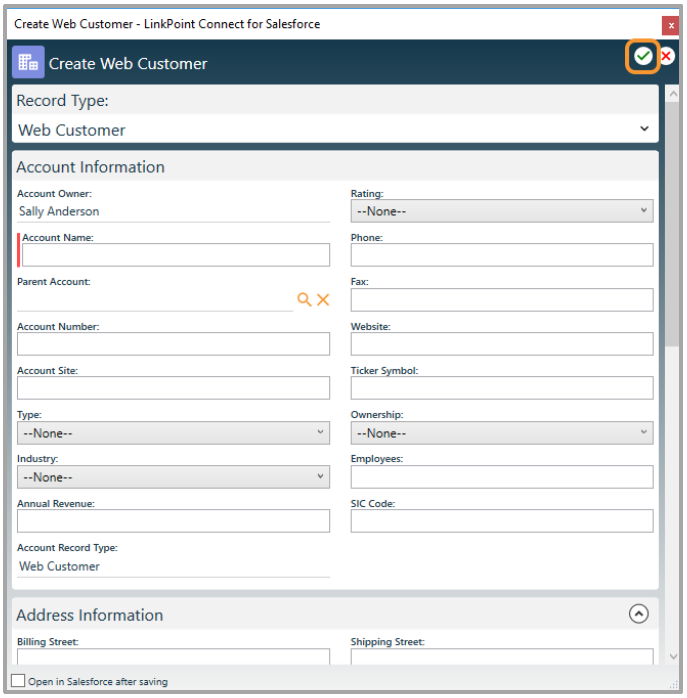
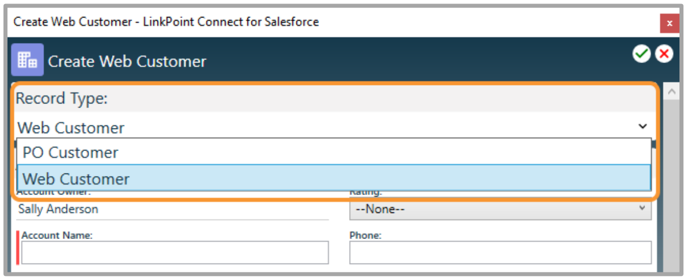
Enter data in the available fields in the SnapForm. Complete all required fields, and click the **green checkmark** to create the item in Salesforce.



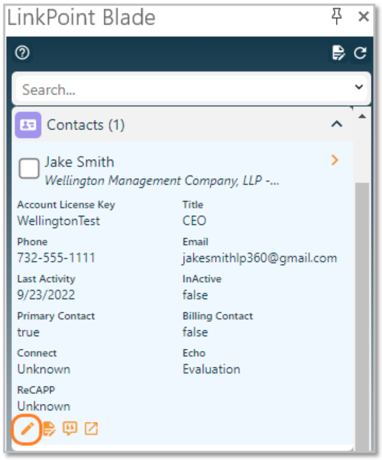
Tip: Users can select a record type for Salesforce objects, where applicable. Select the **Record Type** from the drop-down list at the top of the SnapForm. The fields on the SnapForm will change dynamically based on the selection.



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.