LinkPoint Connect

Virtual Desktop Environment Installation Guide

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LinkPoint Connect for Virtual Desktop Environments

Overview

LinkPoint Connect is designed to work within virtual desktop environments (VDEs) such as Citrix and Terminal Services to streamline installation and control for organizations working in more complex environments. Organizations that use virtual desktop environments can follow the standard installation instructions for LinkPoint Connect with just a few exceptions. LinkPoint360 provides companies working in VDEs with a custom installer designed to streamline the installation process. This installer only installs the binary files into the Program folder. LinkPoint Connect is installed *per machine* or *per server* rather than *per user*.

Installing LinkPoint Connect

In this section, you will learn how to run the installer for LinkPoint Connect in a virtual desktop environment.

Warning: The LinkPoint Connect installer for VDEs must be installed and run by a server admin.

1 Download the installer via the link provided by LinkPoint360. Click the **Save File** button within the dialogue box to download the LinkPoint Installer to the network.
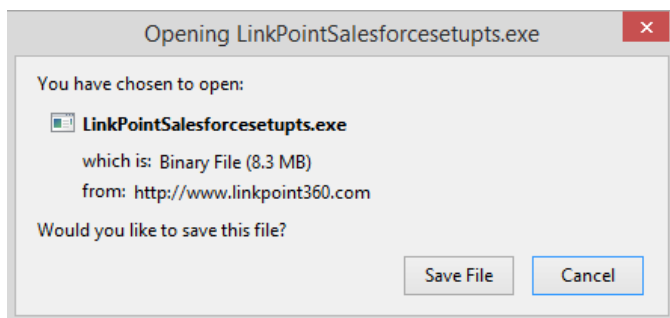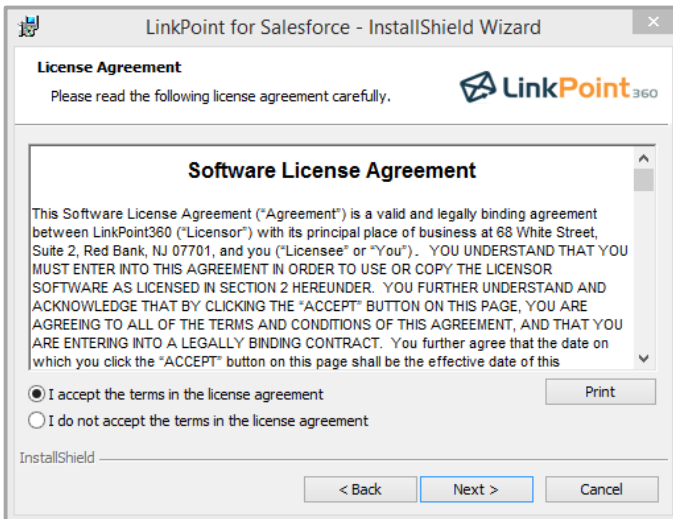

2 Locate the file **LinkPointSalesforceSetupTS.exe** on the server and double click the file to launch the installer.

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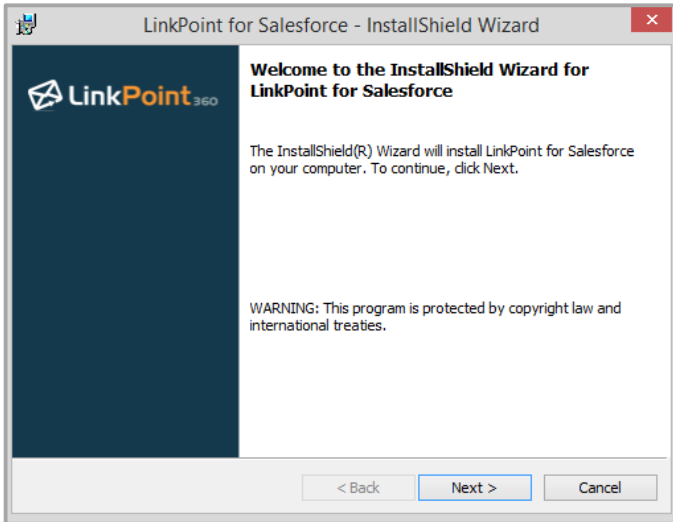

4 Select the **I accept the terms in the license agreement** option, and then click the **Next** button to proceed.

5 Close Microsoft Outlook or Lotus Notes as the admin on the server you are working on. Be sure to close the email application before clicking the **Next** button in the Installer to continue.
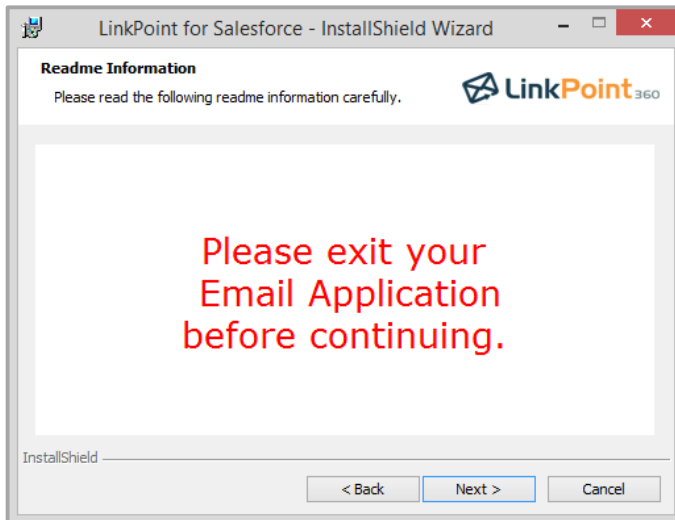

6 Select the installation preferences within the Custom Setup screen. By default, the Installer will place the LinkPoint Connect software in the system Program folder. Click the **Next** button to continue.
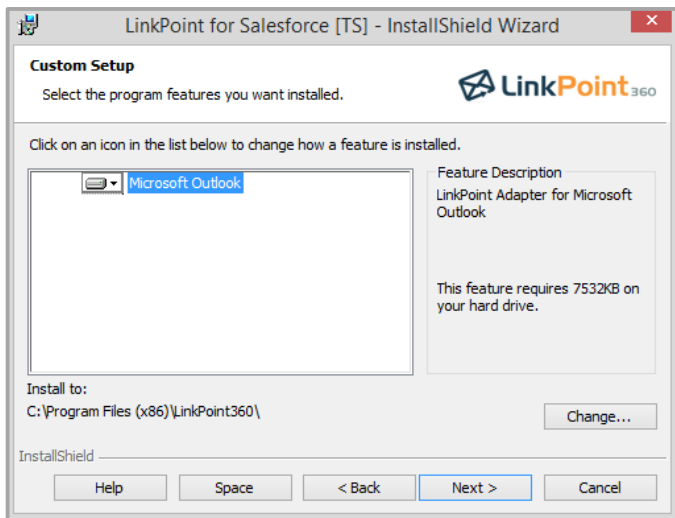
Tip: Organizations that deploy both Microsoft Outlook and Lotus Notes may see both email applications listed in the Custom Setup screen. Be sure to deselect the option that does not apply to your organization's use of LinkPoint Connect.
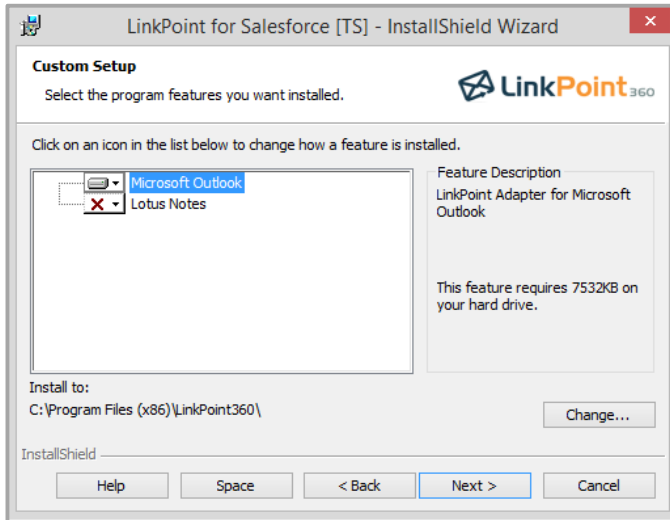

7 Review the **Current Settings** for the installation. Click the **Back** button to make changes, or click the **Install** button to start the installation.
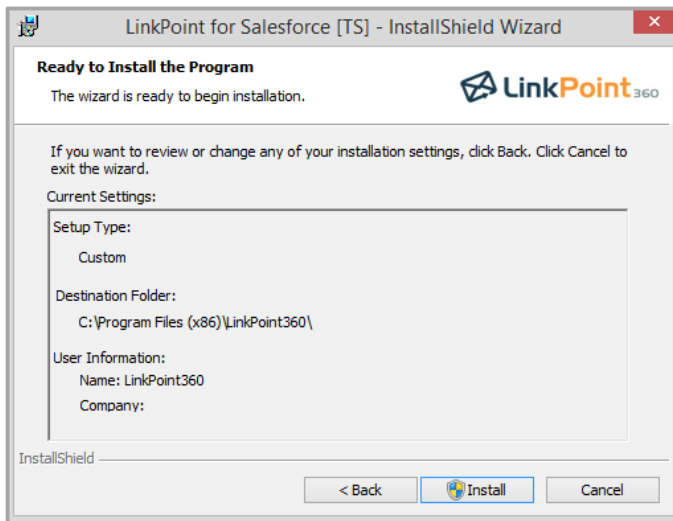
Tip: LinkPoint Connect relies on a common Microsoft technology called **.NET Framework 4 Client Profile** which comes pre-loaded on Windows 7 and above. If your network does not already have this installed, it will automatically be downloaded as part of the LinkPoint Connect installation process.

8 Click the **Finish** button to exit the installer.
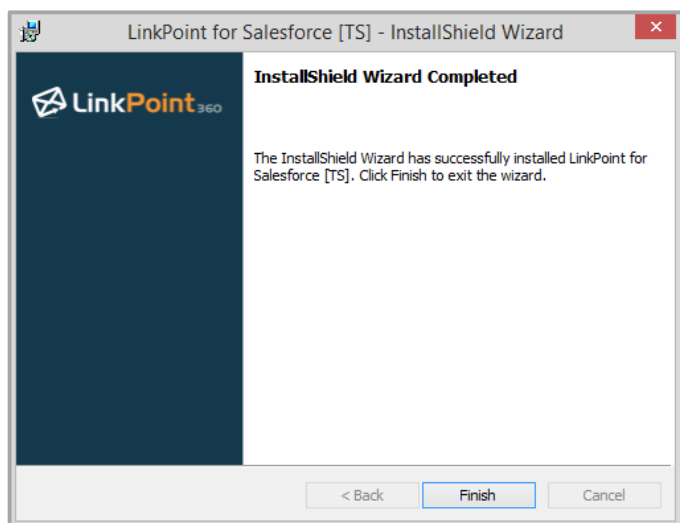
Tip: LinkPoint360 provides a method for storing user configuration settings to a virtual drive mapping regardless of which server the user is accessing. If you are not using Roaming User Profiles, where the Windows AppData path follows the user across servers, and you have multiple Citrix or Terminal Servers where users are load balanced, the server admin will need to add a single file in the LinkPoint Connect installation folder on the server to tell the LinkPoint Connect software where the virtual drive maps to. This allows the LinkPoint Connect software to access the same configuration regardless of which server the user is on.

1. Navigate to the base installation folder (i.e. C: program files lp360).

2. Create a new .txt file named **AppDataPath.txt.** in the directory. Within the .txt file, enter a single line of text pointing to the folder where your organization stores user profiles (i.e. H:\LinkPoint360).

Additional Resources: LinkPoint360 offers implementation services to assist customers with LinkPoint Connect configuration for VDE deployment. This can include prepopulating and locking down fields such as License Key for all users. Contact your LinkPoint360 Account Executive for more information regarding LinkPoint GoLive implementation services.

Tip: If the server is set up as a virtual application environment (vs. virtual desktop), LinkPoint Assist must be launched in the same process as the email application. At certain Citrix sites, two possible issues may arise that this file corrects:

- Between sessions the Outlook Add-in becomes unregistered. We believe, but need to yet verify, that the registry and/or COM registration is being wiped.
- Outlook is unable to instantiate the LinkPoint Assist tray application if it is not already running.

This process will re-register the Add-in with Outlook, launch Outlook and launch LinkPoint Assist. Before publishing LinkPoint Connect as a Citrix application, change the paths to accommodate the environment. The script can be found in the installation directory of the LinkPoint Connect software and is named **StartOutlookLinkPoint360.cmd**. The instructions above are also included inside this file.

## Entering a License Key (for VDE Installation)

In this section, you will learn how to instruct individual users to enter their LinkPoint Connect License Key, which is necessary in order to be able to use the product. Once the software has been installed via Citrix or Terminal Services by the server admin, this process must be followed in order to activate the LinkPoint Connect software. The following steps should be followed by the individual end users on their machines.

1 Close the email application on the individual end user machine.
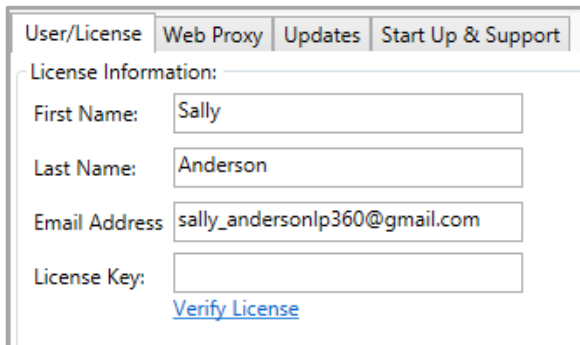
Tip: Server admins and/or software deployment teams may be able to automate this step for end users.

2 Navigate to the **Windows Start Menu** or **Start Folder** and locate the Complete Installation program. Click **Complete Installation** to finish the installation process on the end user machine and to launch LinkPoint Assist.
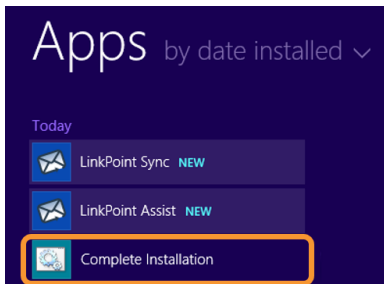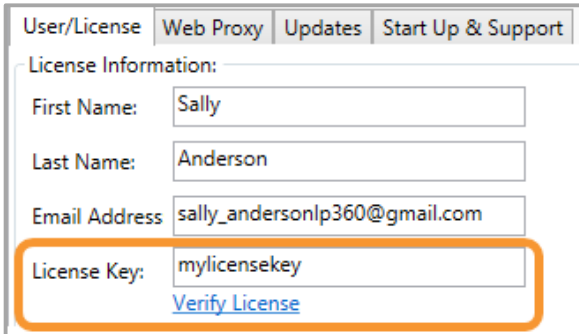

Tip: Clicking the Complete Installation link per user also registers the Outlook Add-In for users running LinkPoint Connect in Microsoft Outlook.

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

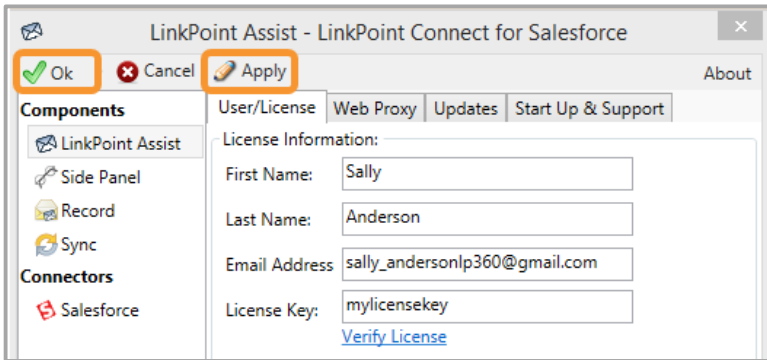**4** Enter the **License Key**, and click **Verify License**.

Tip: This field may be already be populated for the end users as part of the LinkPoint Connect installation services provided by LinkPoint360 Professional Services.

Tip: If the user enters the license key but the field reverts to an Evaluation license key, your firewall may be blocking access to the LinkPoint Connect server or there may be an issue with the proxy settings.

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

Connecting LinkPoint Connect to Salesforce (for VDE Installation)

Once the user has entered the license key, each individual user must connect their instance of LinkPoint Connect to their CRM. This connection is based on the individual user access to the CRM and not the organization. In this section, you will learn how to connect your Salesforce account to LinkPoint Connect.
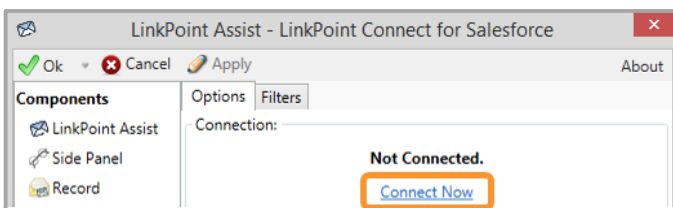
1 Launch the **LinkPoint Assist** window, and select **Salesforce** from the left-hand menu.
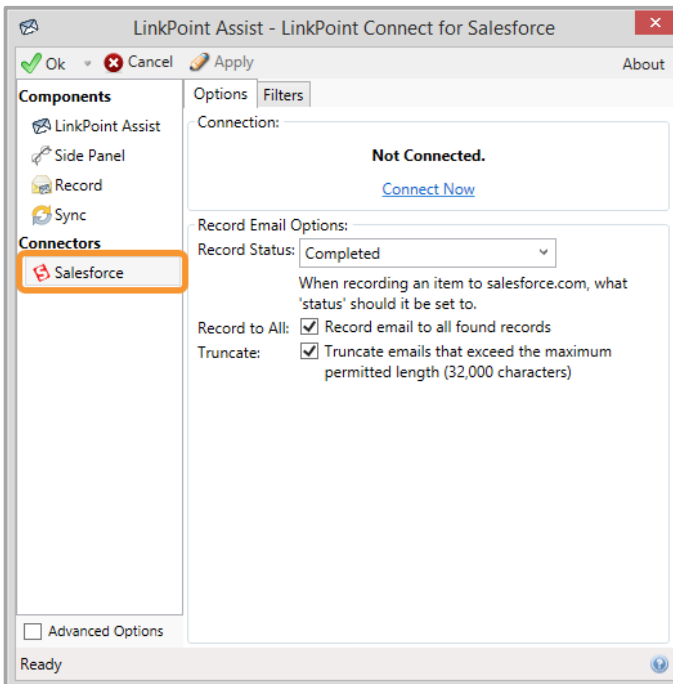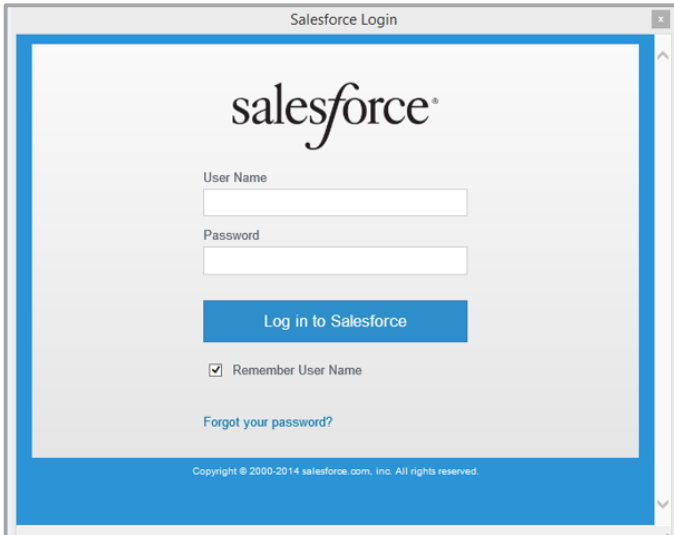
2 Select **Connect Now** within the Connection window to configure LinkPoint Connect for Salesforce.
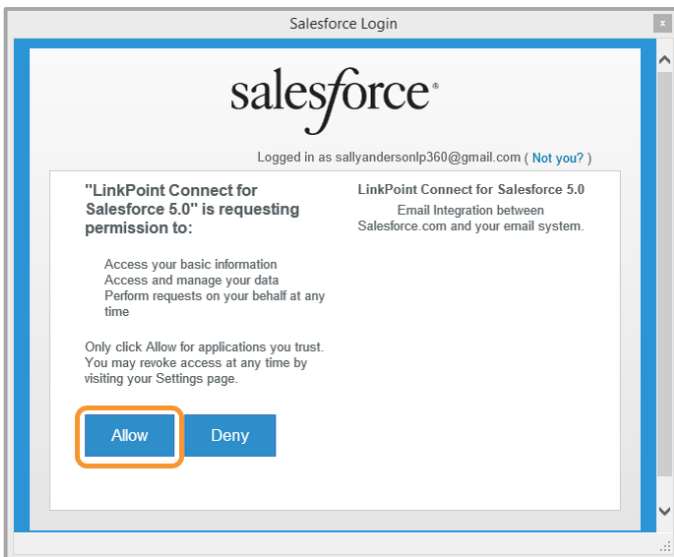
3 Enter your Salesforce **User Name** and **Password**, and click the **Log in to Salesforce** button.

4 Click **Allow** to enable LinkPoint Connect to access your Salesforce account and display your Salesforce information in Microsoft Outlook.

5 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.