LinkPoint Connect: Cloud Edition

Version 3 Release Notes

Overview

Cloud Edition – Version 3

Cloud Edition Release Version 3 is designed to bring insights to admins and end users regarding system usage, connection, and metrics along with a variety of additional enhancements. The following release notes detail the changes that are in effect with the Version 3 Release. For step by step instructions, please refer to the User Guide. If you have questions about your LinkPoint Connect subscription, please contact your Account Executive.

A Note About Software Upgrades

Cloud Edition is upgraded to the latest Version for all user accounts during each release deployment. Version releases may result in an interruption in service or web portal access. Users can review the Cloud Edition Status online for updates on downtime and maintenance windows. Upgrades should not override existing sync configuration. Depending on settings created by an Admin, end users may or may not have access to all of the features listed within the Release Notes. In this case, please contact your Administrator.

General Sync Enhancements

Disable Create Lead/Contact Icons within Sync History Screens

Previous Functionality: Users accessing the Sync History screens for Calendar, Contact, Email, and Task Sync were able to create new leads and contacts within the Unresolved Items and Unmatched Leads/Contacts tabs. Creating new Salesforce records can resolve sync conflicts and allow Cloud Edition to sync items to matching records once they exist in the CRM. However, Admins did not have the ability to disable this feature in support of existing workflow requirements that discouraged users from creating new or duplicate Leads and Contacts.

Enhanced Functionality: Cloud Edition Admins can now disable the icons to create new Leads and Contacts within the Sync History. The option is available for the Calendar and Email Sync Jobs on the Organization, Subscription, and Profile levels. Deselecting the option to "Show icons to create new Leads and Contacts" will hide the icons on both the Unresolved Items and Unmatched Leads/Contacts tab for the related Sync Job.

Default Type for Synced Items

Previous Functionality: Calendar Events, Emails, and Tasks synced to Salesforce were added to the Calendar or Activity History using the default Type selection. Users were unable to change the default in instances where the Type did not reflect the item correctly.

Enhanced Functionality: Users can now set the default Salesforce Type for Calendar Events, Emails, and Tasks. The selections available reflect the picklist that the user has access to within Salesforce. By default, this option is blank, and if no selection is made, Cloud Edition will sync items to Salesforce using the existing default Type in Salesforce. If a selection is made, Cloud Edition will sync all items for that Sync Job using the selected Type. Type fields can be selected independently for each Sync Job. This setting can be preset and locked by Admins at the Subscription and Profile levels. If an organization does not use the Type field, the field will remain blank, and items will sync as usual.

Support for Multi-Who and Encryption Enablement

Previous Functionality: Organizations that implemented Multi-Who or Platform Encryption in Salesforce after the initial configuration for Cloud Edition did not see changes reflected in their sync performance.

Enhanced Functionality: Cloud Edition checks Salesforce for any change in the Multi-Who or Platform Encryption in Salesforce during each sync. If Multi-Who or Platform Encryption are detected, Cloud Edition updates to allow for items to sync in support of these features.

Smart Address

Smart Address Admin Control

New Functionality: Admins can now preselect Smart Address settings and lock the settings to enforce workflow rules at the Subscription and Profile levels. This applies to enabling each Mapped Object, naming conventions, Criteria/Salesforce View, and field mapping on a per object basis. The Admin must be connected to a Salesforce account in order to work with the Mapped Objects settings.

Smart Address Generation with Salesforce Views

Previous Functionality: Smart Addresses could only be generated for each Salesforce object per end user based on set default criteria:

1. The record appears in the Salesforce Recently Viewed table for the user (regardless of whether the user owns the record)
   OR
2. The record is owned by the current user (does not need to appear on the Recently Viewed table)
   AND
3. The object must have a standard OwnerID field and Tasks as a child relationship for items to be recorded to.

Items with a status of "Closed" are no longer excluded by default. Customer can request filtering on the Status for applicable Salesforce objects (i.e. Opportunities, Cases).

Enhanced Functionality: As an alternative to the existing default criteria, users can now leverage Salesforce Views to generate custom criteria for Smart Addresses. Users create a specific Salesforce View for each Salesforce Object that requires Smart Addresses. Cloud Edition will create Smart Addresses based on the items that appear in the View, using the View filter criteria. Only the View filters are referenced, and the default criteria for Smart Address is disregarded.

Users can work with items regardless of ownership or whether they have worked with an item recently. The object must have Tasks as a child relationship for items to be recorded to. The information displayed in the details for a Smart Address in the Exchange fields is dynamically pulled from the fields that are displayed in the Salesforce View, making it easy for users to identify records for use.

Mapped Objects Table Indicates Filter Criteria

Previous Functionality: Smart Address Map Objects screen displayed current Salesforce Objects and Enabled status with no additional details.

Enhanced Functionality: Smart Address Map Objects screens now includes the Criteria/Salesforce View applied to each Salesforce Object for quicker insight into the configuration. If no Salesforce View has been selected, the value "Default" is displayed, and the object is employing the default Smart Address generation method. If a view is selected, the View name will be displayed as it appears in Salesforce.

Mapped Objects Page Indicates Criteria/Salesforce View

Previous Functionality: Smart Address Map Objects screens displayed all relevant configuration settings but did not indicate to the user which level of the hierarchy they were reviewing.

Enhanced Functionality: Smart Address Map Objects screens include the name of the specific hierarchy level (i.e. Example Company [Subscription]) to clarify which settings are being reviewed or changed.

Reporting

Daily Sync Report

New Functionality: A Daily Sync Report is emailed to all active users with a summary of sync usage and outstanding items. Details include the current number of Unresolved Emails and Unresolved Calendar Items as well as the total of Unmatched Leads and Contacts as reflected in the Sync History. This information is designed to encourage users to ensure that the correct Contacts and Leads are created in Salesforce to boost CRM adoption and ensure that communications can be correctly matched and recorded based on the sync rules in place. The notification also includes a summary of All Time Stats to demonstrate business value as well as Yesterday's Stats to show the change on a daily basis. This feature is on by default. The email notifications can be disabled by individuals or by Admins on the User level by deselecting the option to **Send Daily Sync History Report.**

Admin Dashboard

New Functionality: Administrators can now review system usage and performance metrics on the Dashboard. Admins can access the Dashboard via the button on the Home screen. The Dashboard contains three main data types: Usage Stats, User Status, and User Sync Status. Usage Stats provide insight into the total number of items synced with Cloud Edition. These figures can be filtered using the Filter and Range criteria provided. User Status shows how many purchased licenses are in use and how users have progressed through the onboarding process, showing Acceptance status as well as connection to Salesforce and Exchange. The User Sync Status demonstrates which Sync Jobs are in active use and usage volume.

User Report

New Functionality: Administrators can download a full User Report as an Excel file containing per-user details. This report is accessible on the Dashboard and can be filtered to show metrics for specific Subscriptions or Profiles as well as set date ranges. Data points in the report include:

- User Details (name, email address, Salesforce and Exchange accounts, Cloud Subscription and Profile)
- Connection Status (Salesforce, Exchange, Active, Locked Out)
- Enabled Sync Jobs (Calendar, Contact, Email, Smart Address, Task)
- # of Synced, Unresolved, and Unmatched items per Sync Job (as applicable)

LinkPoint TouchDate Compatibility

New Functionality: The LinkPoint TouchDate supports Salesforce users who want to view reports and usage metrics for Cloud Edition users within Salesforce. To use this feature, the Salesforce Admin must add a Custom Field as a Date/Time Type in Salesforce named "LinkPointTouchDate__c" and add the field to all of the Objects for which they would like to capture metrics. Cloud Edition will date stamp each item recorded to Salesforce within this field to indicate the last time the item was created or updated by the system.