Setting Up Your Profile

To access your user profile, click your name in the top right corner of PinPoint when you are logged in.

Basic Settings

Define your basic user settings, such as your Username, Email, First Name, Last Name, Password, Security Question, Profile Picture, and Time Zone.

To download Dynamsoft, which is the TWAIN driver you will need to scan into PinPoint directly, click Download Dynamsoft.

Default Settings

Define your Default Settings, which will be the settings that auto-populate when you want to file or search documents within PinPoint.

You can preset the cabinet, folder, sub-divider, document type and document tab if desired. The default settings can also be changed/removed at any time.

After your default settings are saved, you must close out of PinPoint and log back in for the settings to go into effect.

For the SmartScan field, you can select a default rule type for when you are using SmartScan for auto-filing with ARIE.

Additionally, if your user belongs to multiple groups, or has access to multiple filerooms, you can set both a default Group and Fileroom under this section.

SMTP Settings

If you plan on emailing from PinPoint, you will need to fill out the SMTP Settings.

You will need to contact your email service provider or your IT staff for your SMTP settings. The information you will need to fill in is as follows:

1. SMTP Server:The name of your SMTP email server
2. SMTP Email:Your full email address
3. SMTP Password:Your email password
4. SMTP Port:The port number your SMTP server requires
5. Use SSL / Use TLS:Check these boxes if the SMTP settings for your email server require them

To test your SMTP settings, click Test SMTP. You will get a successfully message if the SMTP settings are correct and an error message if the SMTP settings are incorrect.

If SMTP settings are set up on the admin profile, users with blank settings for SMTP server name, port, and SSL/TLS will inherit those settings from the system admin account. Users can have different SMTP settings from the system admin account, and user SMTP settings override the admin SMTP settings (ex. a user would like to use a Gmail account instead of a company email).

SSO Settings

If SSO is part of your PinPoint subscription, you may also input your SSO Settings regarding your LinkedIn, Microsoft, Gmail, and Facebook accounts.

DocuSign Settings

If you have a DocuSign API account, you can input your DocuSign Settings so that it is synced with PinPoint. Please contact your PinPoint Project Manager for assistance.