

# *LinkPoint for NetSuite CRM*

Email Tutorial  
Lotus Notes Edition

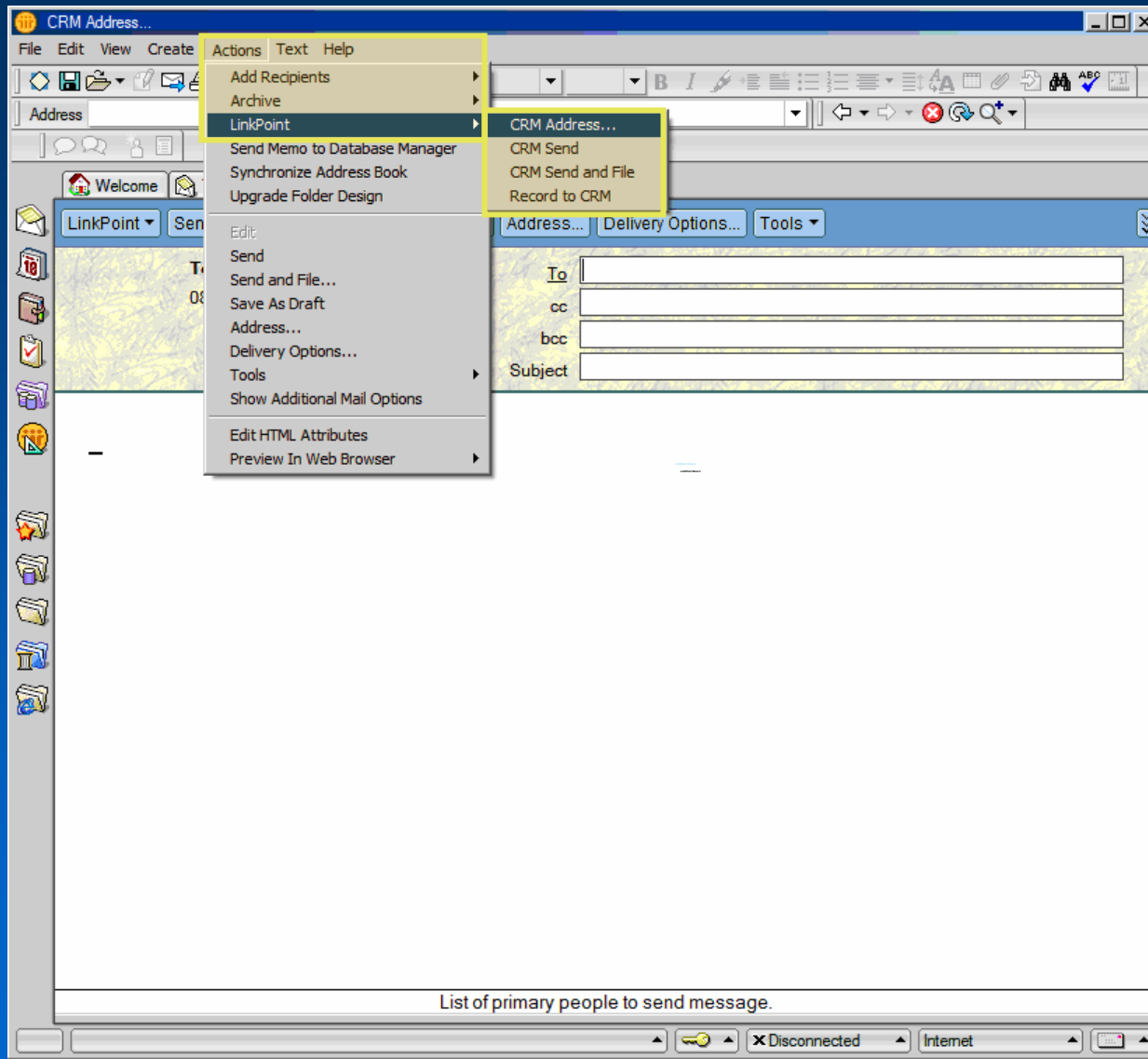


# ***Email Tutorial Overview...***

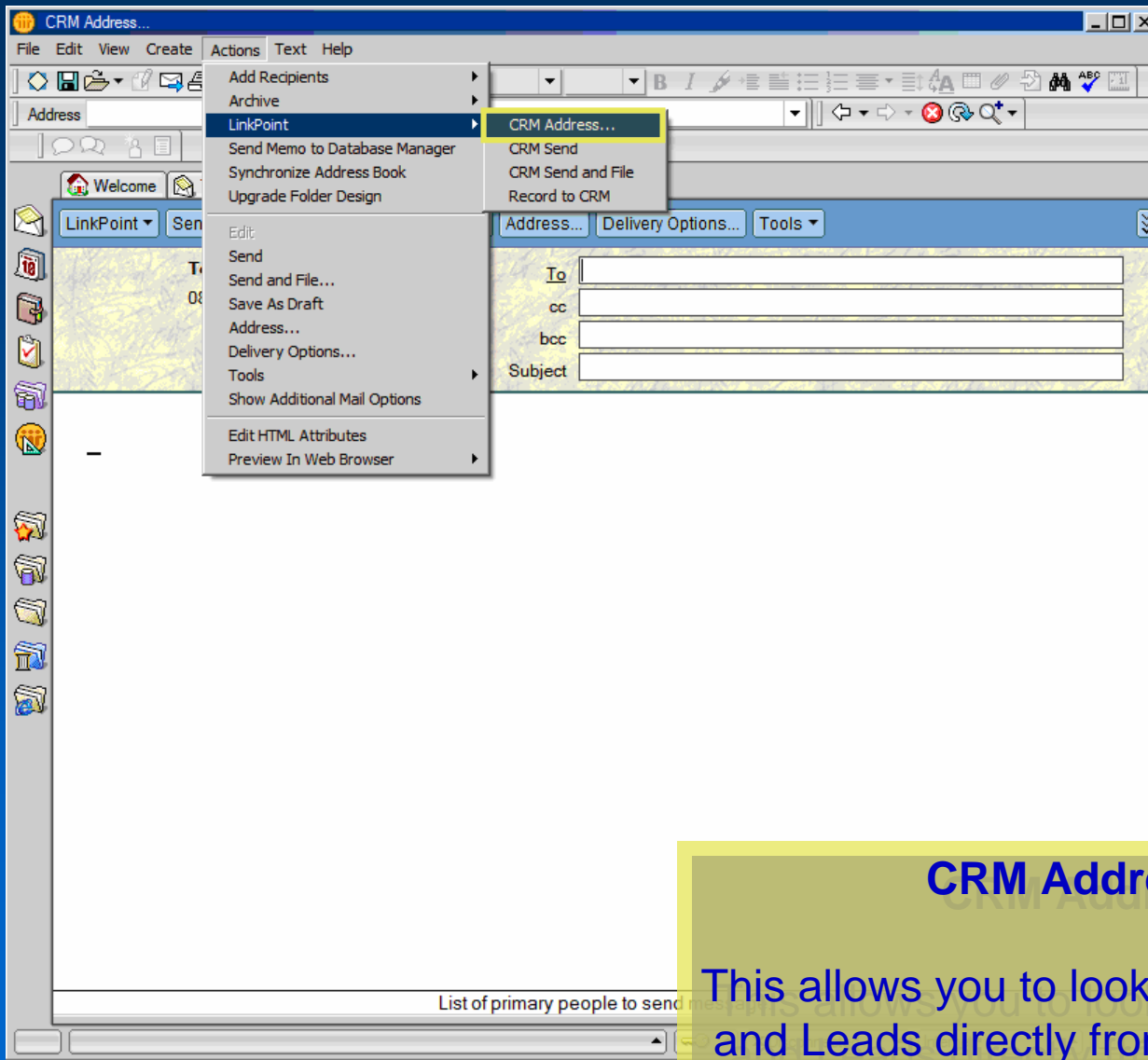
- 1. How to access LinkPoint from Lotus Notes.**
- 2. How to record an outbound email from Lotus Notes to NetSuite CRM.**
- 3. How to record an inbound email from Lotus Notes to NetSuite CRM.**

# *Step 1*

**How to access LinkPoint  
from Lotus Notes.**

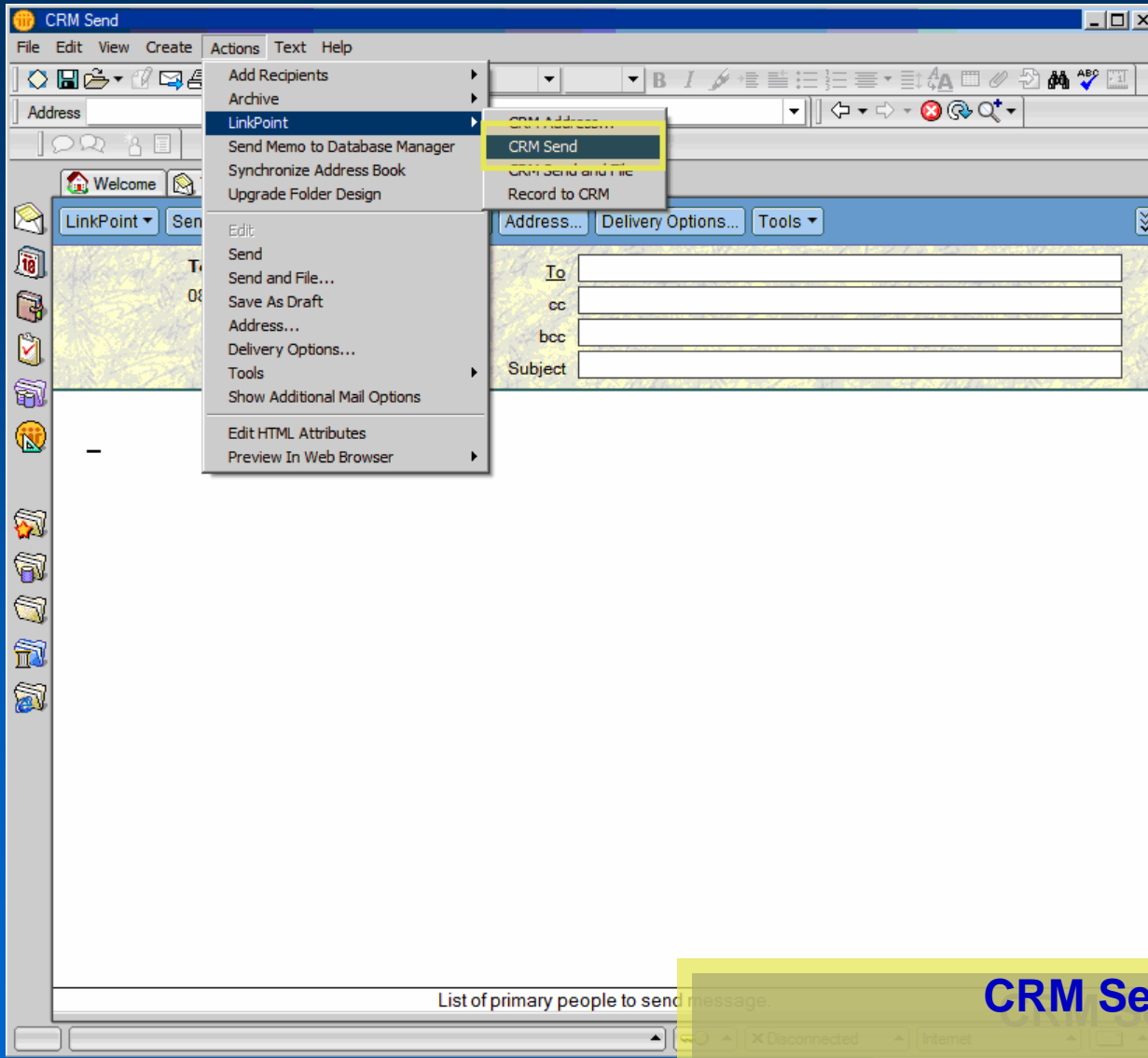


There are 4 LinkPoint menu's available from within Lotus Notes.



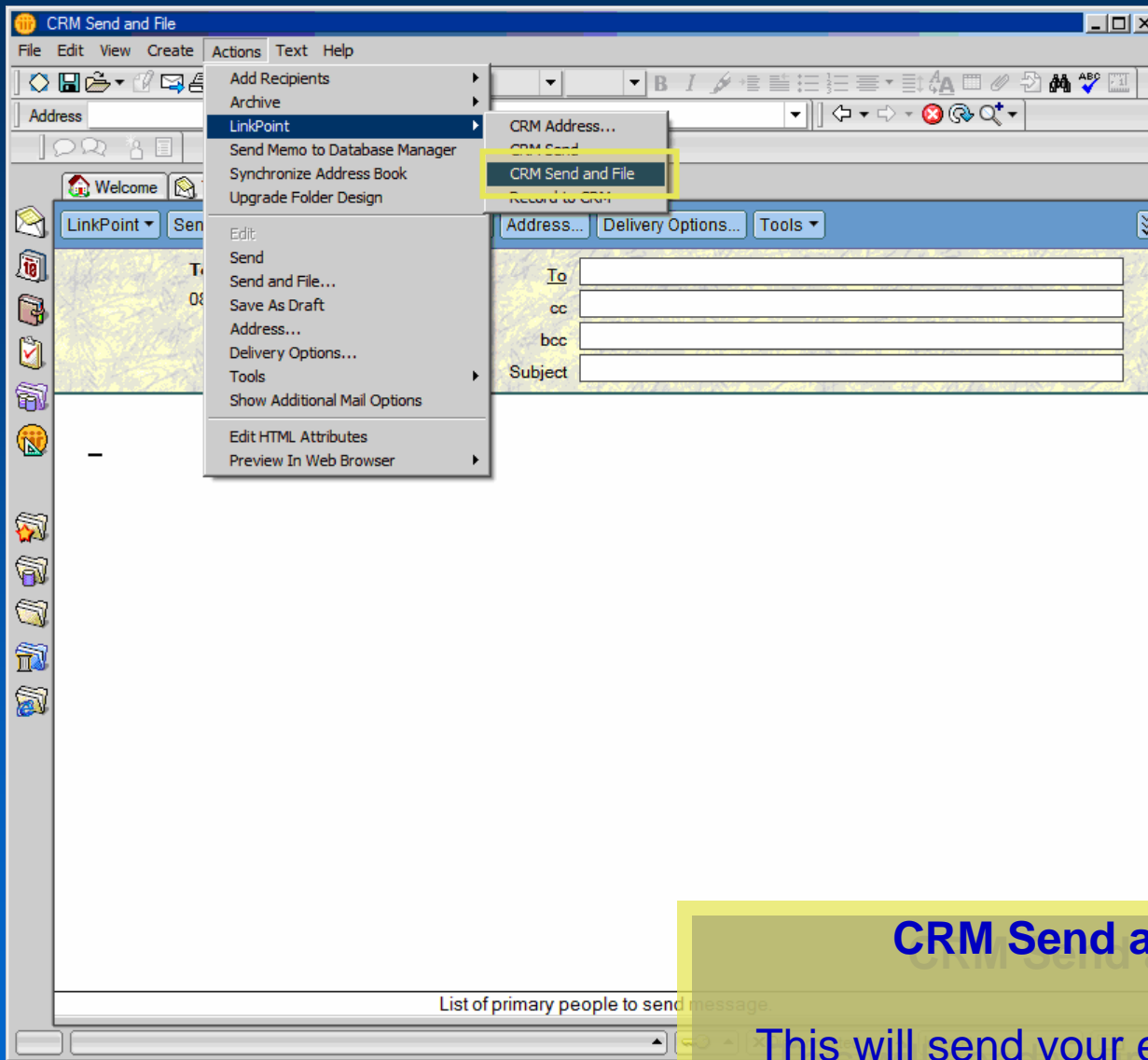
## CRM Address...

This allows you to lookup your Contacts and Leads directly from NetSuite CRM and use them as recipients in your Email.



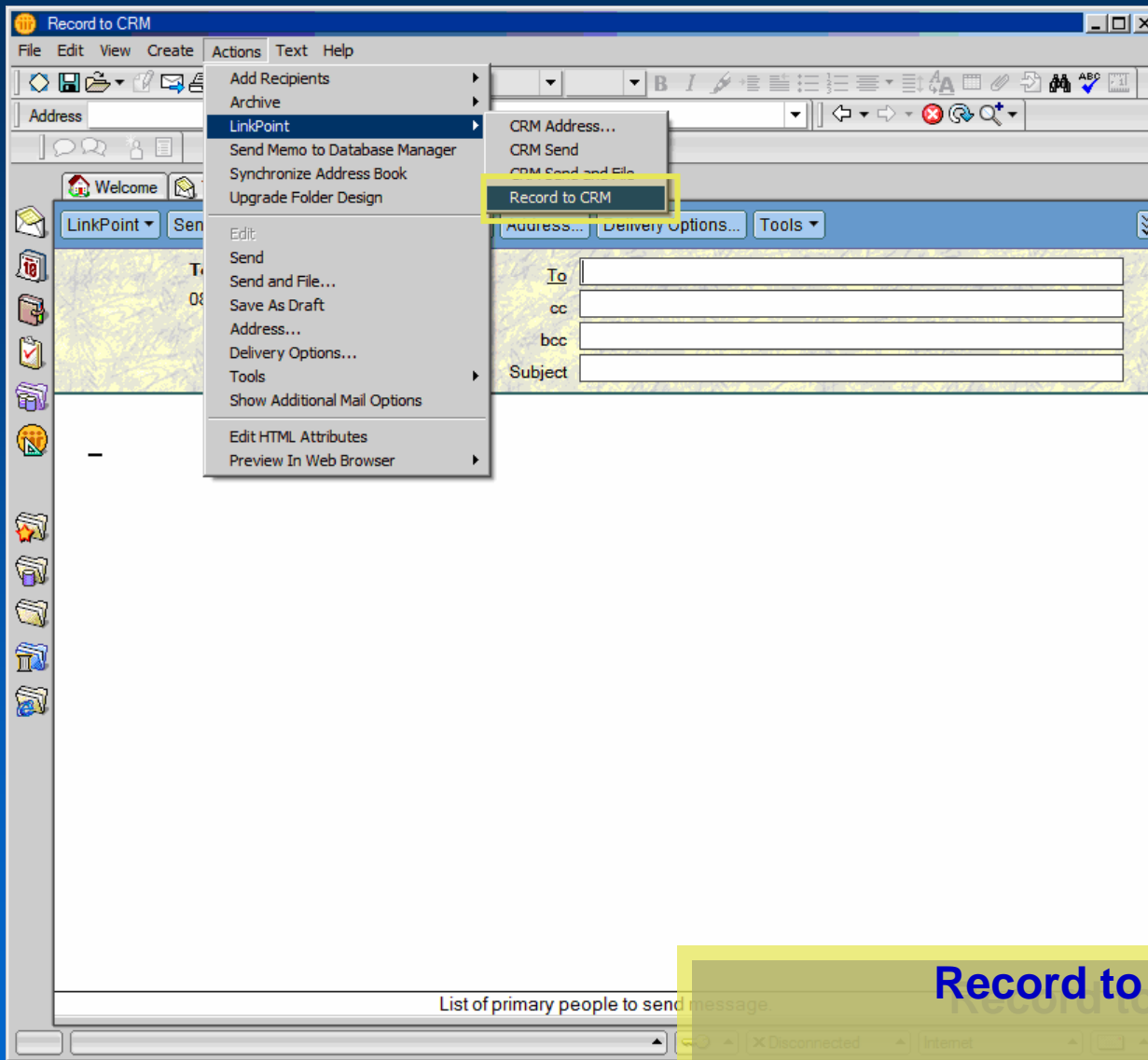
## CRM Send

This will send your email via Lotus Notes and record it to NetSuite CRM.



## CRM Send and File

This will send your email via Lotus Notes, file it in a folder in Lotus Notes and record it to NetSuite CRM.

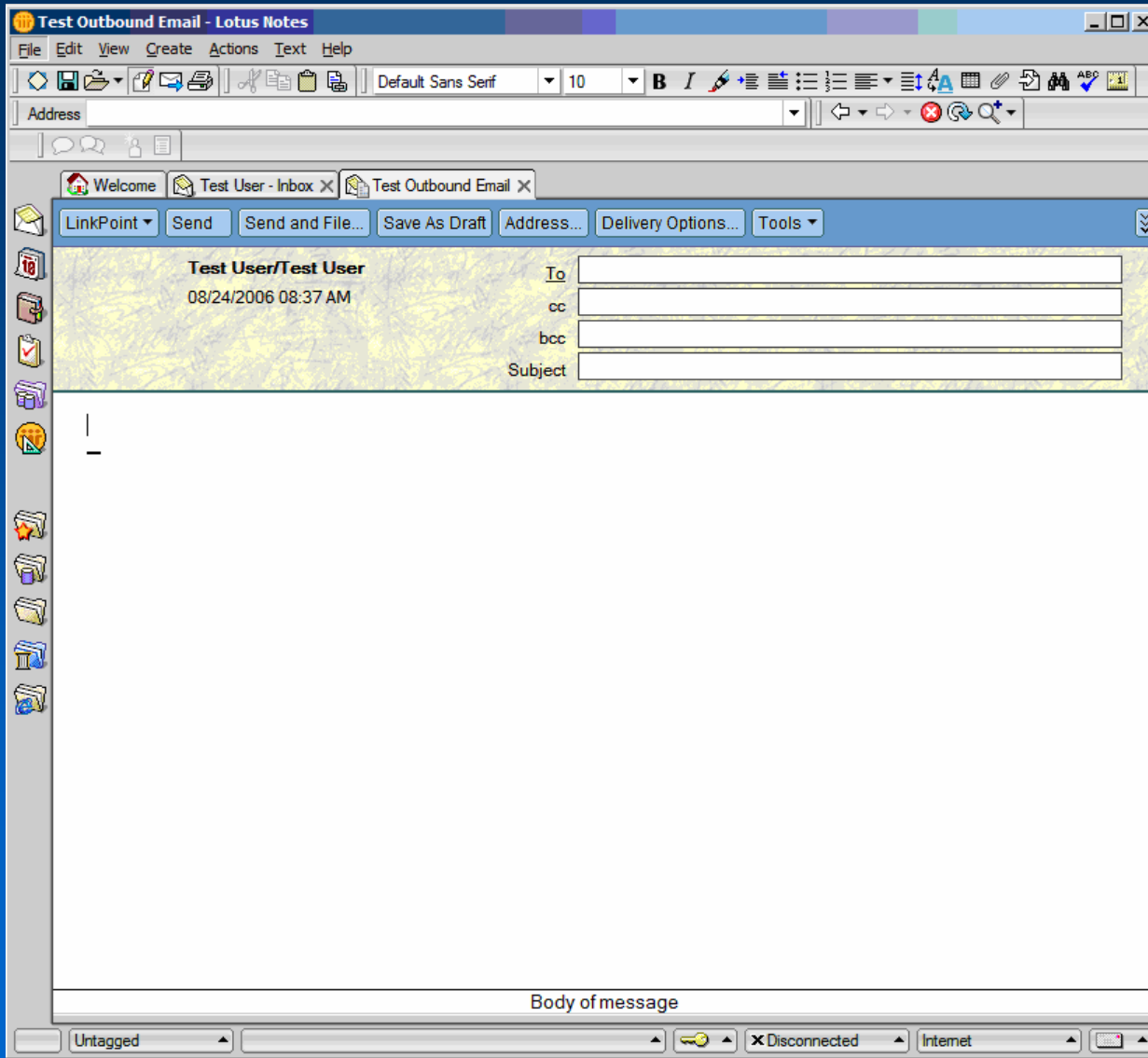


## Record to CRM

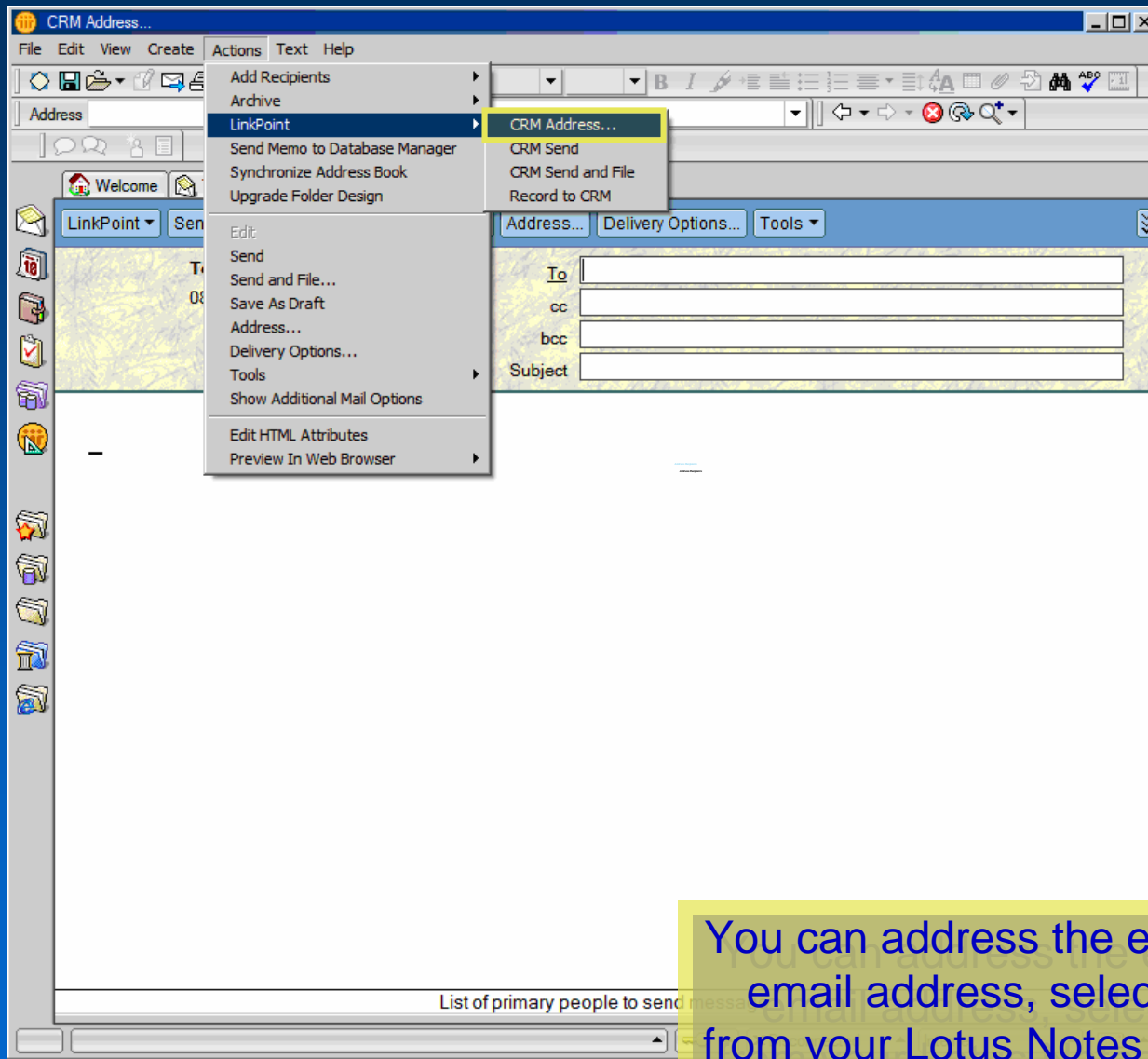
This will record an inbound email or previously sent email to NetSuite CRM

# *Step 2*

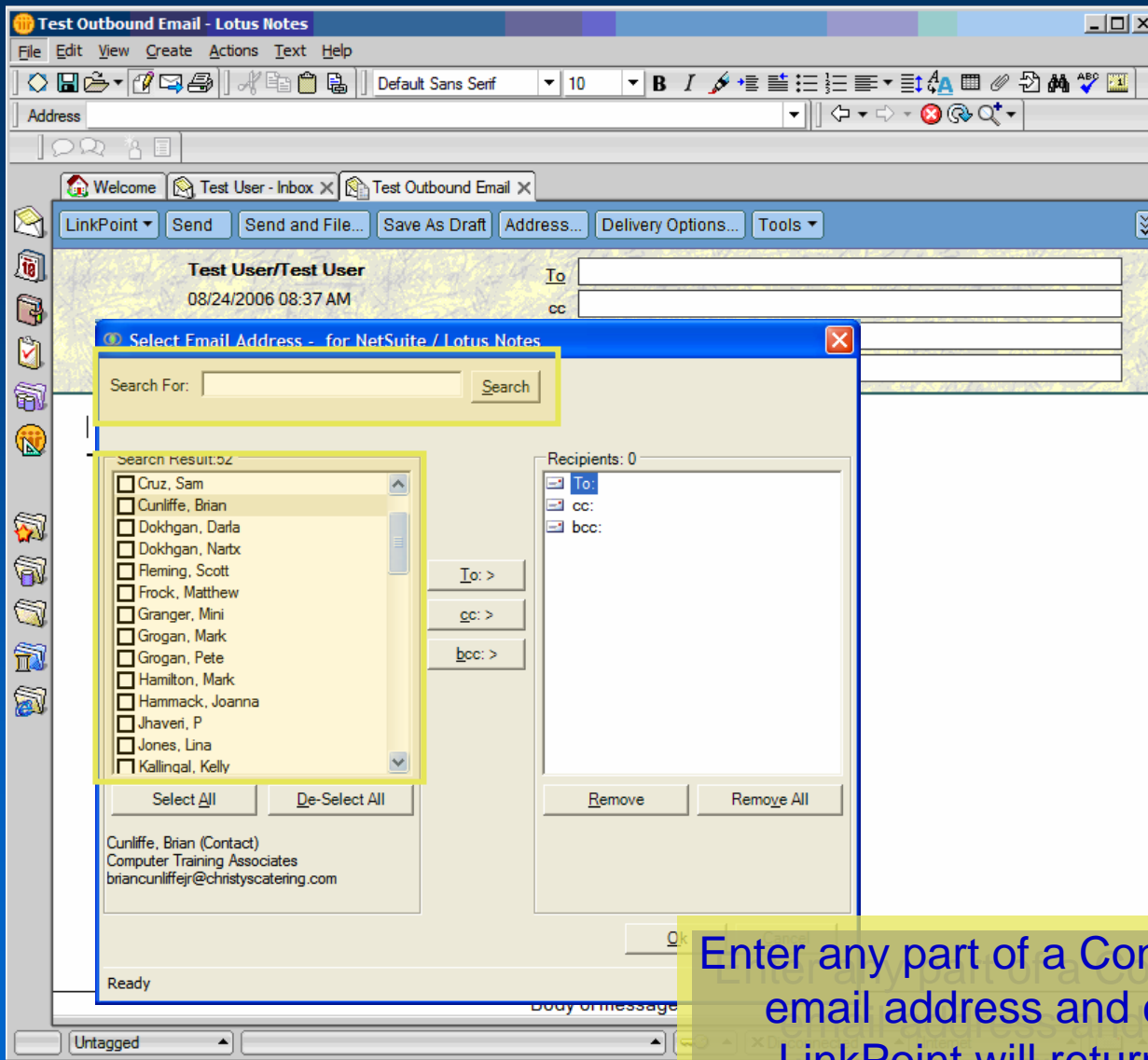
**How to record an Outbound email  
from Lotus Notes to NetSuite CRM.**



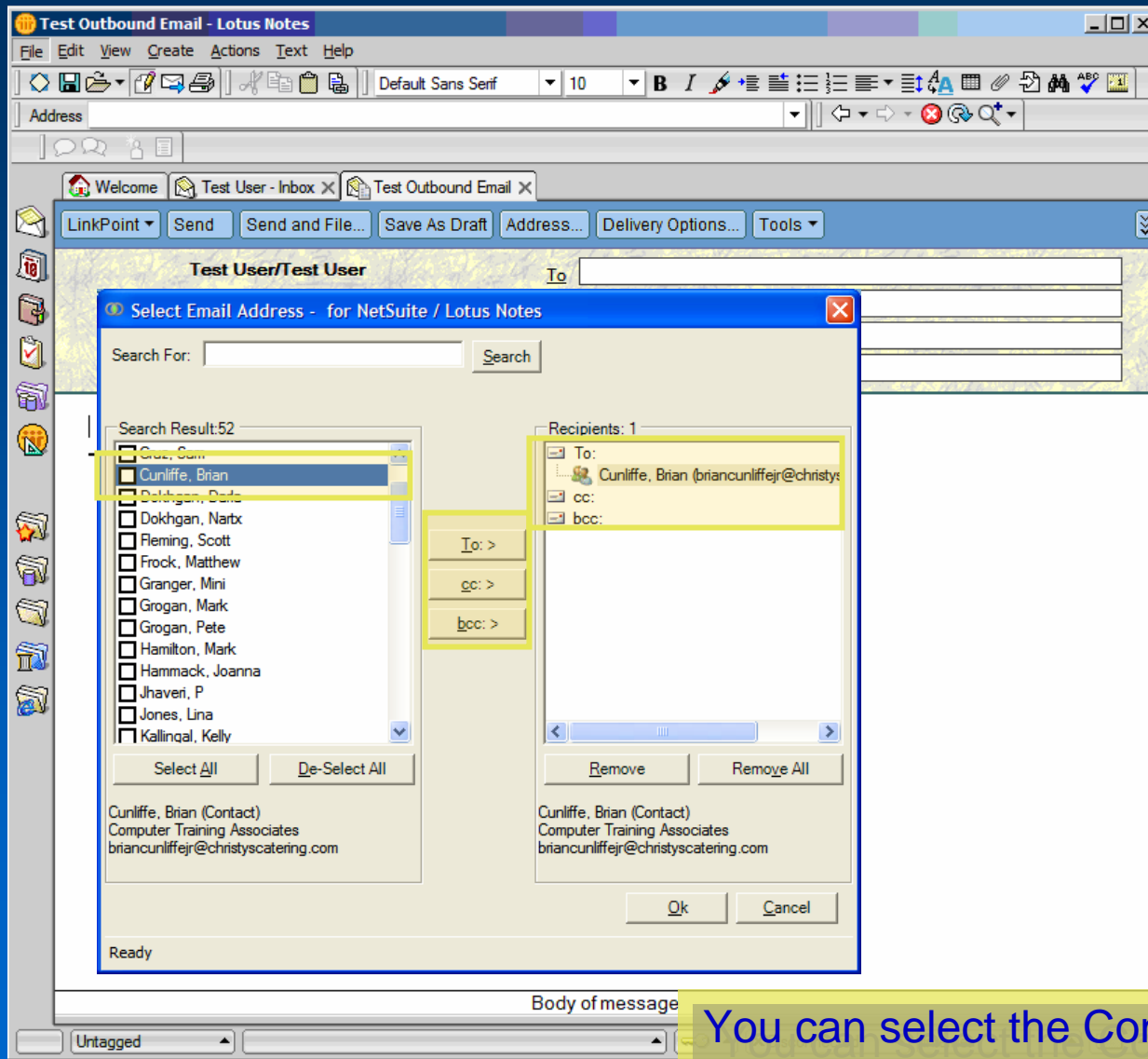
Start a New Memo



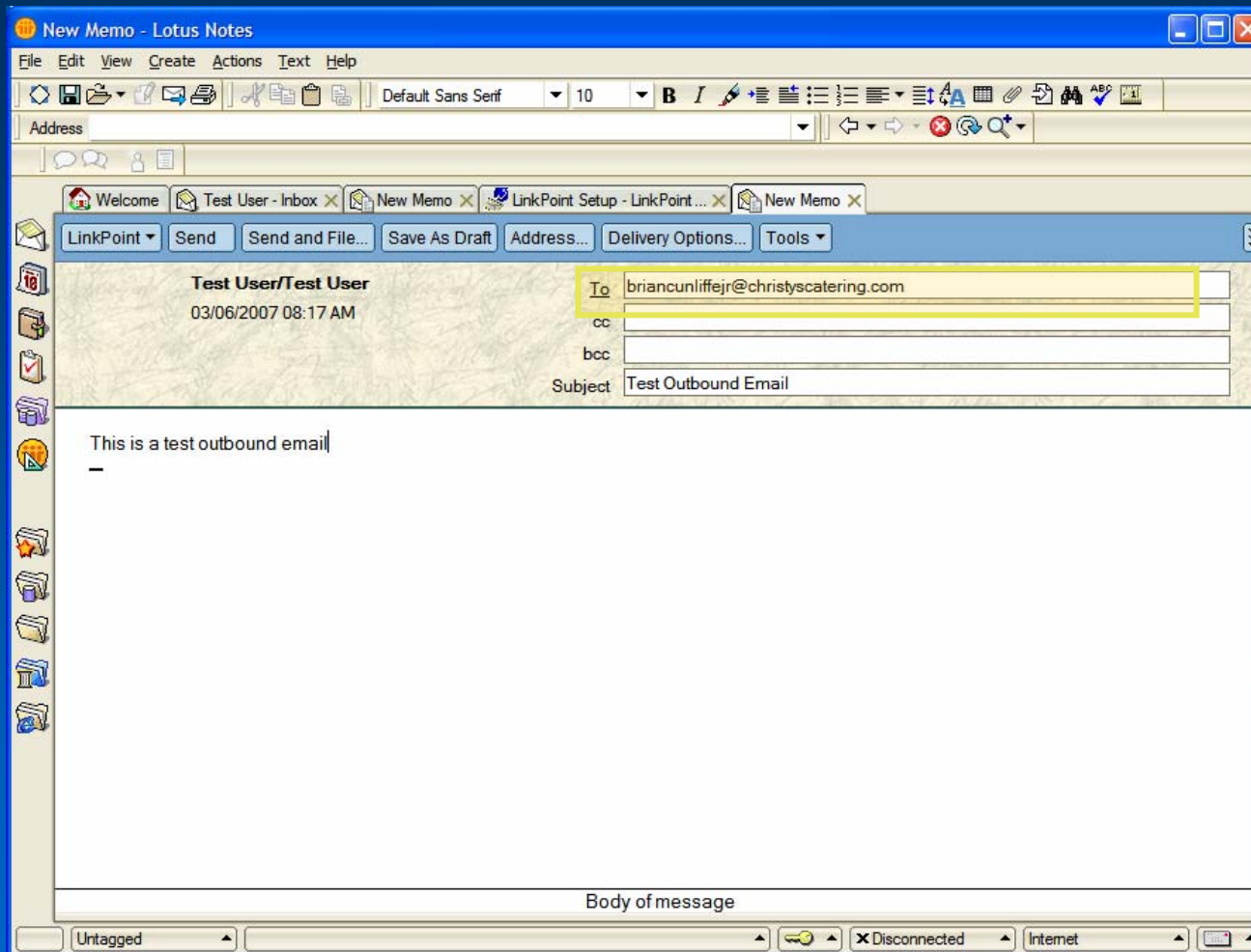
You can address the email by typing an email address, selecting a recipient from your Lotus Notes address book, or by using the LinkPoint NetSuite CRM Address book.



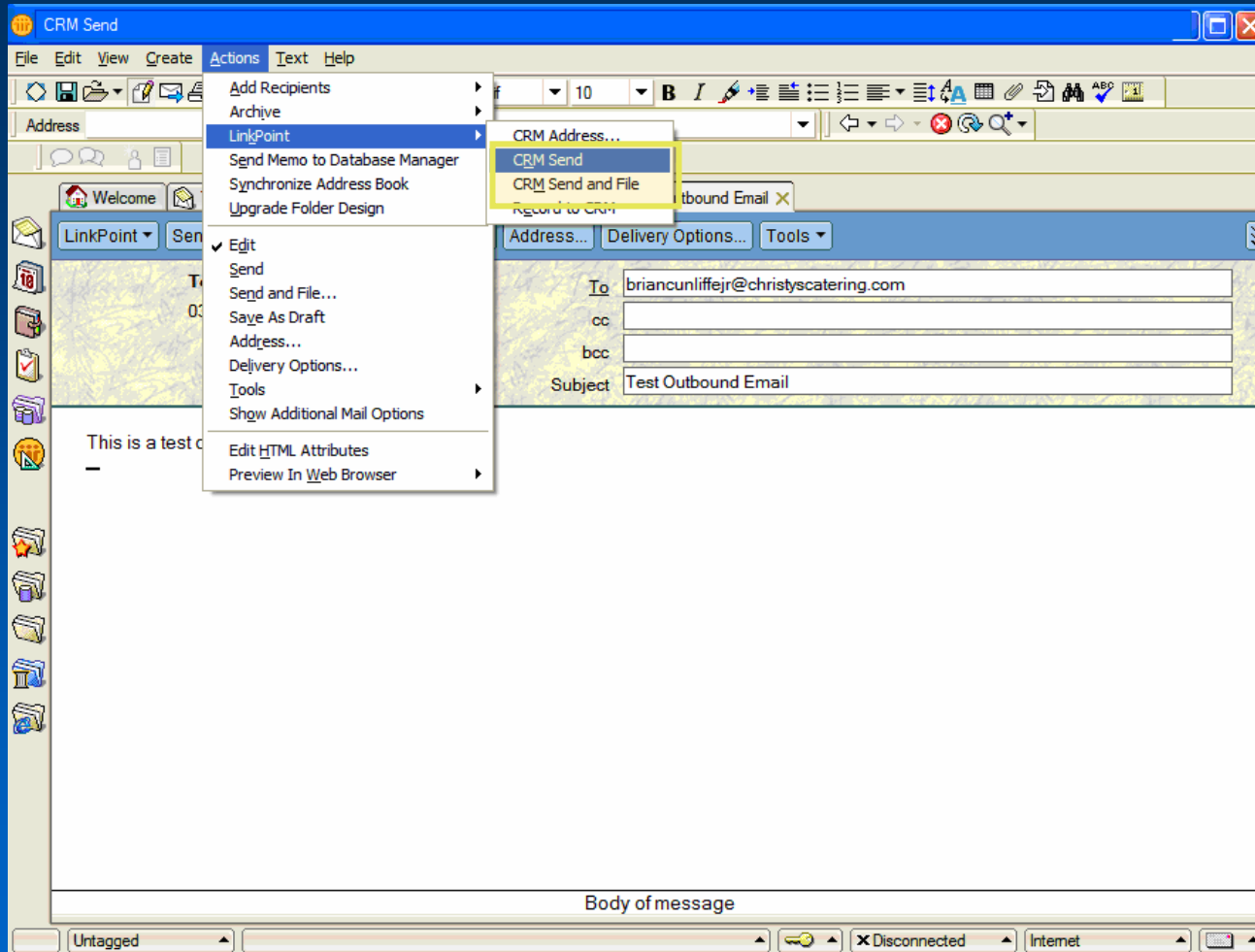
Enter any part of a Contact last name or email address and click "Search". LinkPoint will return all Contacts containing the search criteria.



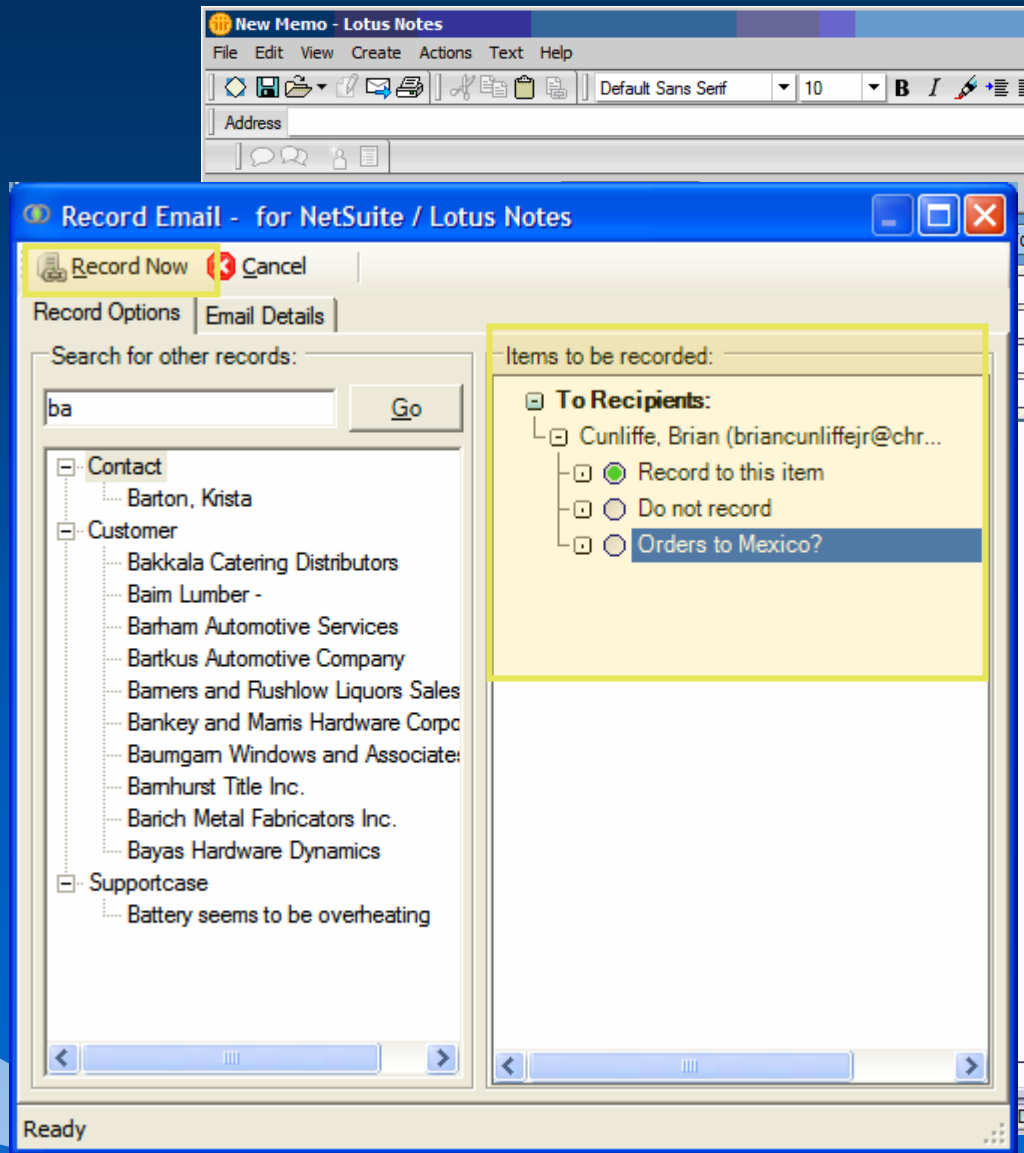
You can select the Contact or Lead and click the "To", "CC", or "BCC" to move the Contact or Lead to the recipient list.



The recipients are placed in the appropriate fields and you can continue typing your email.



To send the email and record it to NetSuite CRM, select "Actions", "LinkPoint", then click the "CRM Send" or "CRM Send and File" menu option.



The LinkPoint email window is used to identify how to record the email to NetSuite CRM.

LinkPoint uses the recipient's email address to look up the Contact to associate the email to. For each recipient in the email, you can choose "Record to this item", "Do not record" or record to an associated opportunity or case.

You can also choose to store the email attachments in NetSuite CRM or even record to additional Contacts, Leads, Accounts, Opportunities or Cases.

Click "Record Now" to send the email via Lotus Notes and record the email to NetSuite CRM or "Cancel" to return to Lotus Notes.

Microsoft Internet Explorer window: Contact - NetSuite (Wolfe Electronics) - https://system.netsuite.com/app/common/entity/contact.nl?id=179

NETSUITE™ | Change Role | Sign Out | Help | Global Search

Home | Activities | Leads | Opportunities | **Customers** | Forecast | Reports | Documents | Setup | Support

Customers > Contacts > Wolfe Electronics - Nartx Dokhgan (Sales Manager)

**Contact** | Find Contact | Prev | Next

Create New: Task | Phone Call | Event | Note | Email | Letter | PDF

Contact: Brian Cunliffe | Job Title: | Address: | Company: Computer Training Associates | Main Phone: | Private: No | Mr./Ms...: | Fax: | Inactive: No | Name: Brian Cunliffe | E-mail: brianacunliffejr@christyscatering.com

Buttons: Edit | New | Print | Show Activity

Tabs: General | Info | Address

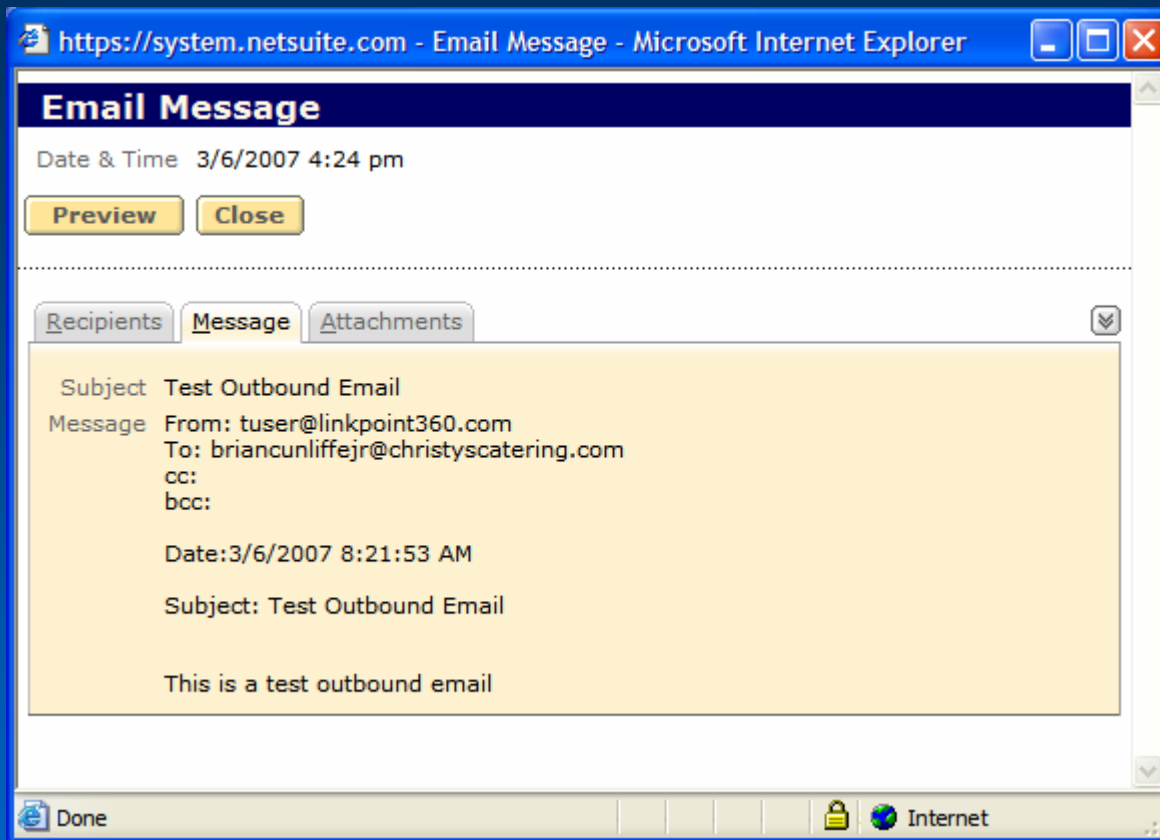
Sub-tabs: Companies | Activities | User Notes | System Notes | Messages | Cases | Files | Campaigns

Message Actions: Email | Attach | Letter | PDF | Fax | Refresh | View History | Customize View

#	View	Date	Author	Recipient	Subject	Type	Files	Remove
1	<a href="#">View</a>	03/06/2007 04:24 pm	Nartx Dokhgan	Brian Cunliffe	Test Outbound Email	Email	No	<a href="#">Remove</a>

Done | Internet

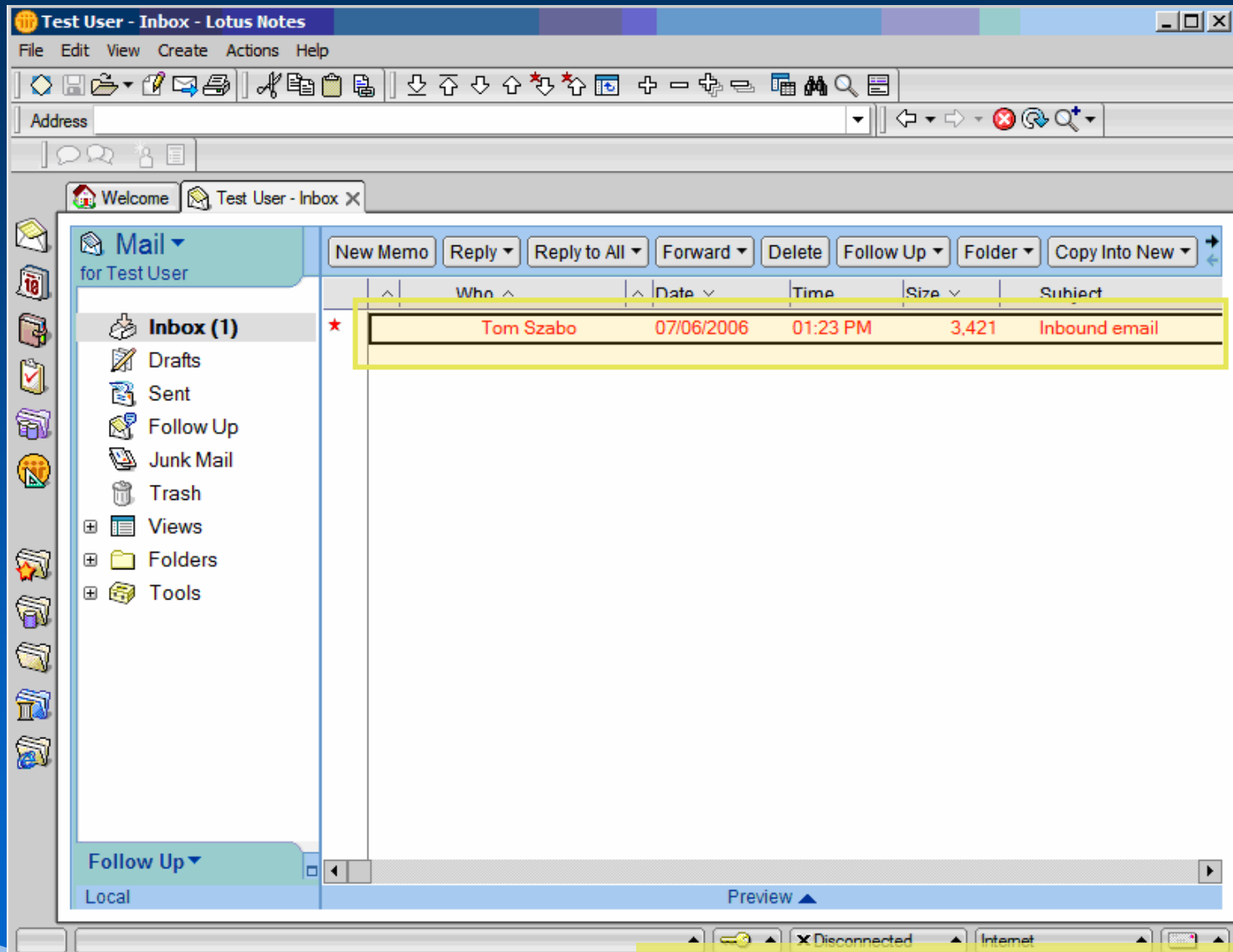
The email has been recorded in the NetSuite CRM Messages section.



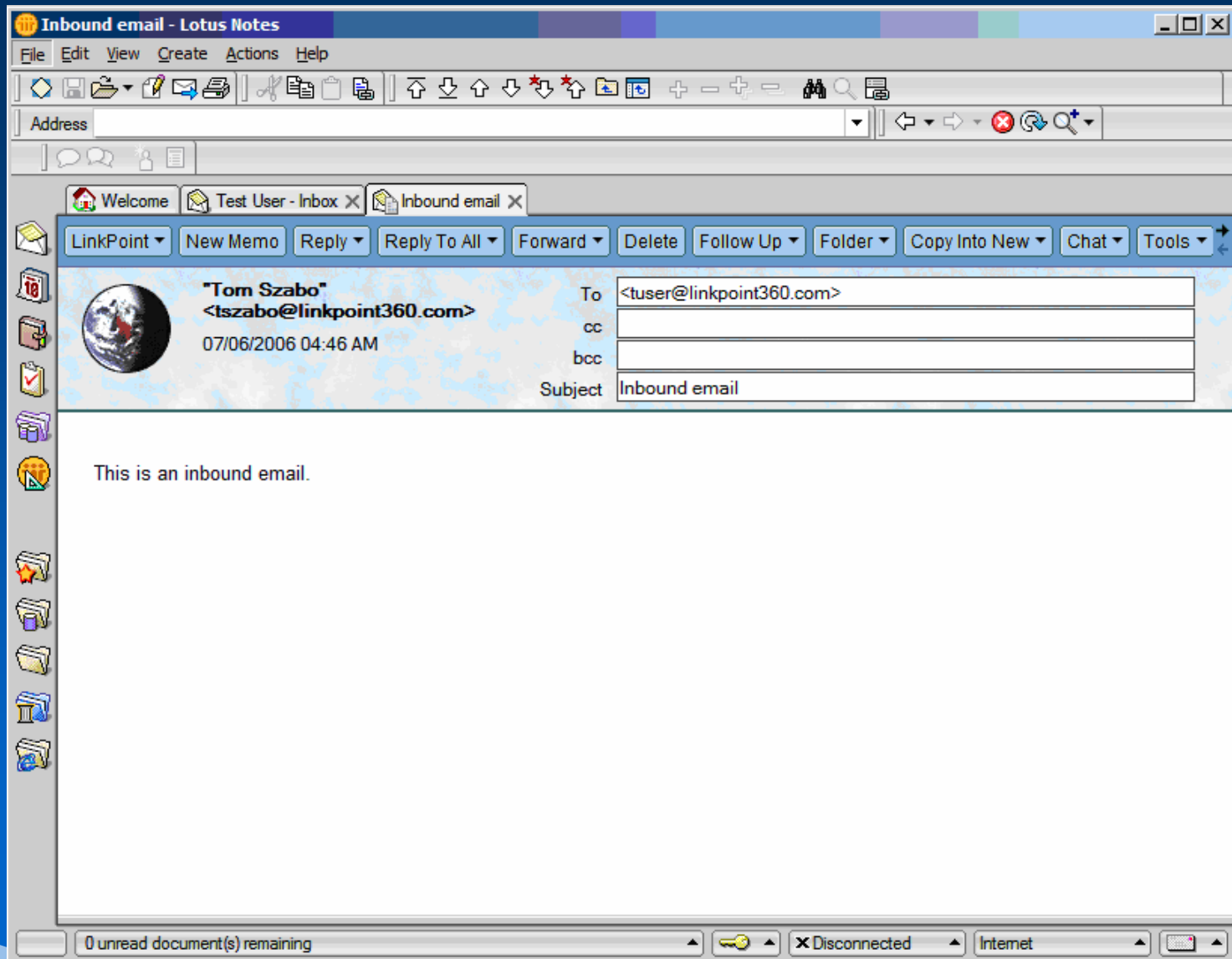
If you "Click" on the email, NetSuite CRM will display the details of the message and a listing of all attachments that were included on the email.

# *Step 3*

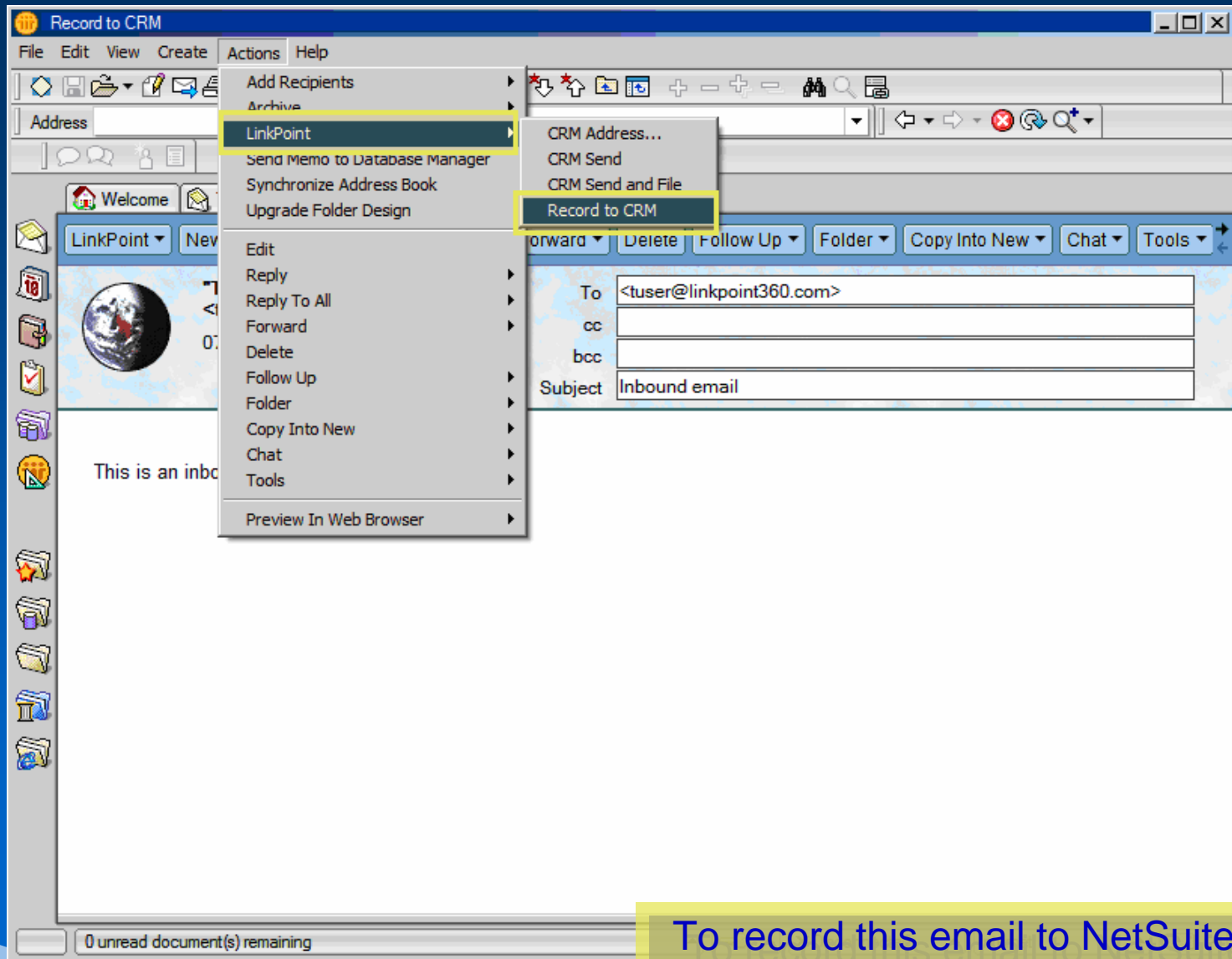
**How to record an Inbound email  
from Lotus Notes to NetSuite CRM.**



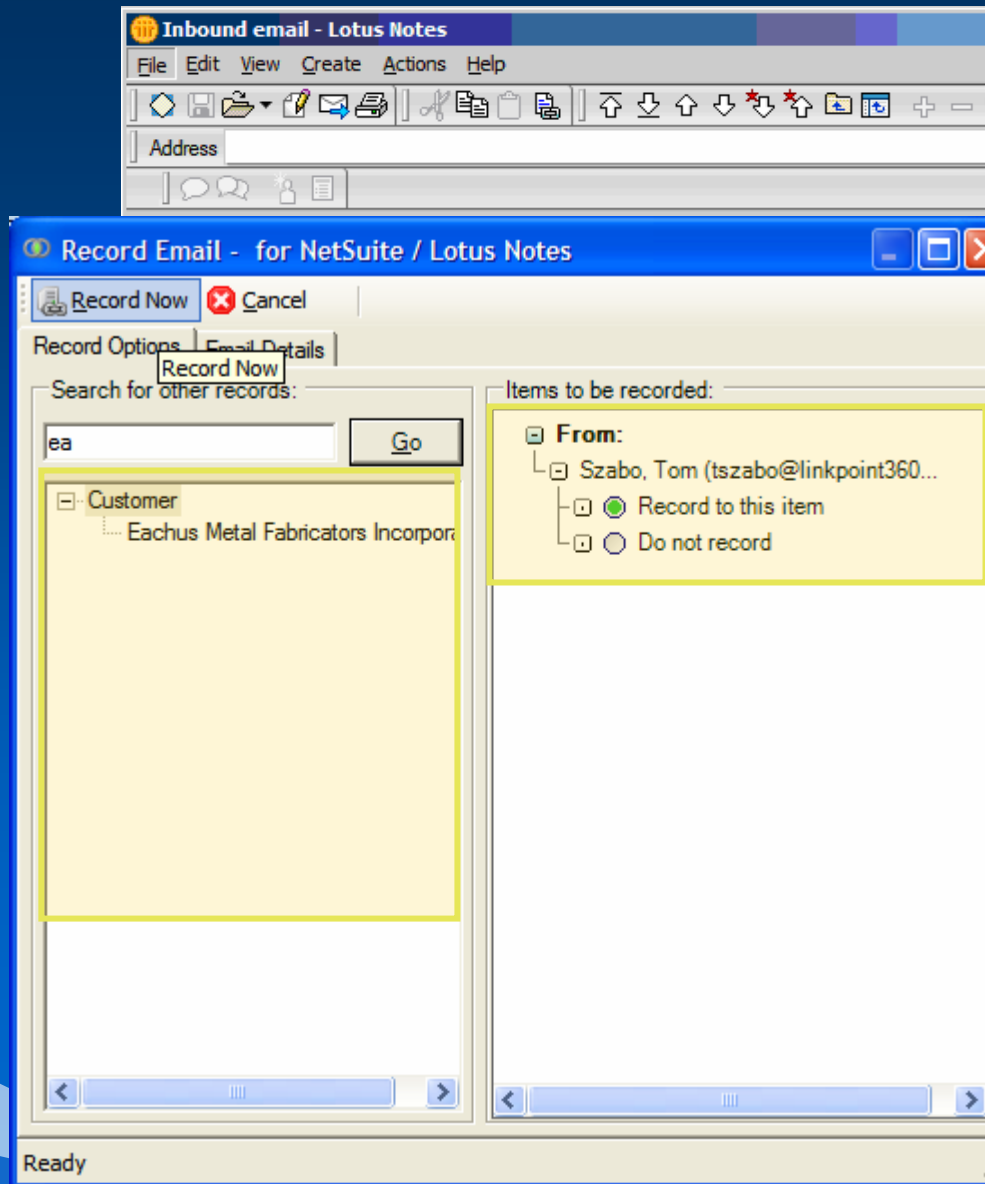
Select the email in Lotus Notes that you would like to record to NetSuite CRM.



Open the email in Lotus Notes.



To record this email to NetSuite CRM, click "Actions", LinkPoint", and Record to CRM"



The LinkPoint email window is used to identify how to record the email to NetSuite CRM.

LinkPoint uses the From email address to look up the Contact to associate the email to. If it is not found, it will be listed in the “Email Addresses not found in NetSuite CRM” section.

You can then either add that Contact to NetSuite CRM and record the email back to that Contact or search for another Account, Contact, Lead, Opportunity or Case to record it to.

Click “Record Now” to record the email to NetSuite CRM or “Cancel” to return to Lotus Notes.

Microsoft Internet Explorer window: Contact - NetSuite (Wolfe Electronics) - Microsoft Internet Explorer

Address: https://system.netsuite.com/app/common/entity/contact.nl?id=10536

NETSUITE™ | Change Role | Sign Out | Help | Global Search

Navigation: Home | Activities | Leads | Opportunities | **Customers** | Forecast | Reports | Documents | Setup | Support

Customers > Contacts > Wolfe Electronics - Nartx Dokhgan (Sales Manager)

**Contact** | Find Contact | Prev | Next

Create New: Task | Phone Call | Event | Note | Email | Letter | PDF

Contact: Tom Szabo | Job Title: | Address: | Company: LinkPoint360 | Main Phone: | Private: No | Mr./Ms...: | Fax: | Inactive: No | Name: Tom Szabo | E-mail: [tszabo@linkpoint360.com](mailto:tszabo@linkpoint360.com)

Buttons: Edit | New | Print | Show Activity

General | Info | Address

Messages Section:

- Companies | Activities | User Notes | System Notes | **Messages** | Cases | Files | Campaigns
- Buttons: Email | Attach | Letter | PDF | Exp | Refresh | View History | Customize View
- View: Default

#	View	Date	Author	Recipient	Subject	Type	Files	Remove
1	<a href="#">View</a>	03/06/2007 04:28 pm	Tom Szabo	Nartx Dokhgan	Inbound email	Email	No	<a href="#">Remove</a>

Done | Internet

The email has been recorded in the NetSuite CRM Messages section.

# ***Contact Information***

The LinkPoint email tutorial is now complete.  
Please contact us for additional Sales or Support  
questions.

Sales: 732-212-8401  
Support: 732-212-8403

E-mail: [info@LinkPoint360.com](mailto:info@LinkPoint360.com)

Web: <http://www.linkpoint360.com>