

# *LinkPoint for NetSuite CRM*

Lotus Notes Edition



# ***With LinkPoint you can...***

- **Access your NetSuite CRM Contacts and Leads as an address book in Lotus Notes.**
- **Record Inbound and Outbound e-mails from Lotus Notes into NetSuite CRM.**
- **Store e-mail attachments in NetSuite CRM.**
- **Attach e-mails to Accounts, Contacts, Leads, Opportunities, or Cases.**
- **Synchronized Calendar, Contact and Tasks between NetSuite CRM and Lotus Notes.**

# *Sample LinkPoint Client Base*

ABN-AMRO

Gulfstream Aerospace

The Hartford

TransUnion

Discovery Communications

Panasonic

Deutsche Bank Securities

American Express

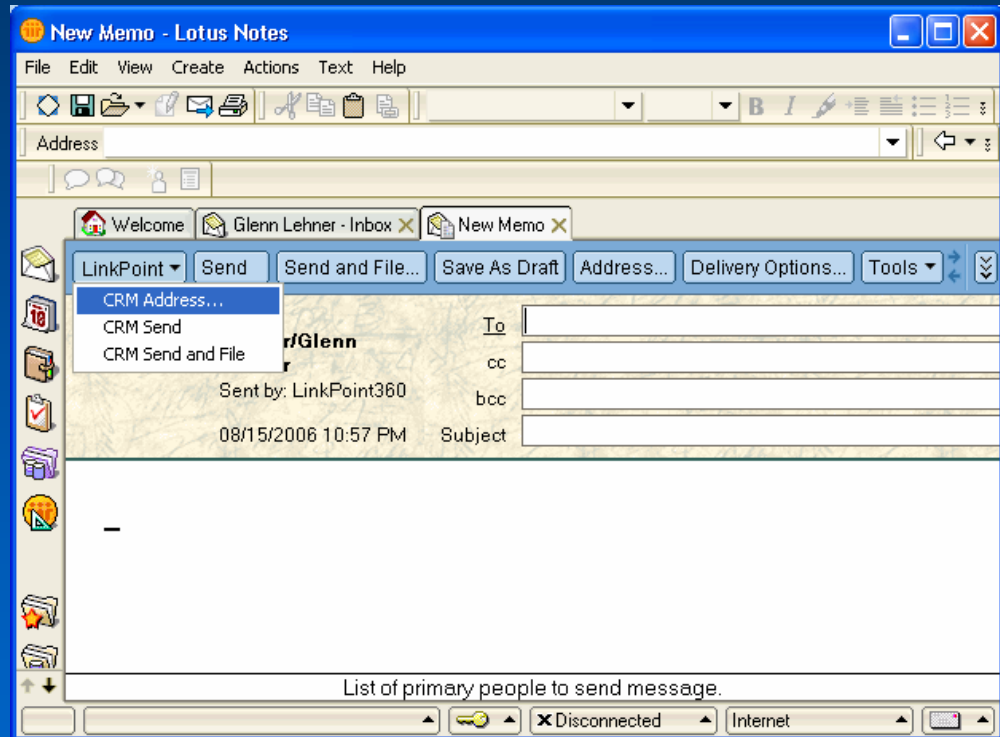
The New York Times Company

Deluxe Corporation

Armstrong World Industries

# LinkPoint e-mail Overview

- You can utilize your NetSuite CRM contacts for addressing by selecting the “CRM Address” menu.
- You can send your e-mail via Lotus Notes and record it to NetSuite CRM by selecting “CRM Send” or “CRM Send and File” menu.



# LinkPoint Addressing

- In the LinkPoint Address form you can search NetSuite CRM for Contacts and use them as recipients in your e-mails.

Select Email Address - for NetSuite / Lotus Notes

Search For:  Search

Search Result:52

- Cruz, Sam
- Cunliffe, Brian
- Dokhgan, Darla
- Dokhgan, Narbx
- Fleming, Scott
- Frock, Matthew
- Granger, Mini
- Grogan, Mark
- Grogan, Pete
- Hamilton, Mark
- Hammack, Joanna
- Jhaveri, P
- Jones, Lina
- Kallinqaal, Kelly

Select All De-Select All

Cunliffe, Brian (Contact)  
Computer Training Associates  
briancunliffejr@christyscatering.com

Recipients: 1

To: Cunliffe, Brian (briancunliffejr@christyscatering.com)

cc:

bcc:

To: >  
cc: >  
bcc: >

Remove Remove All

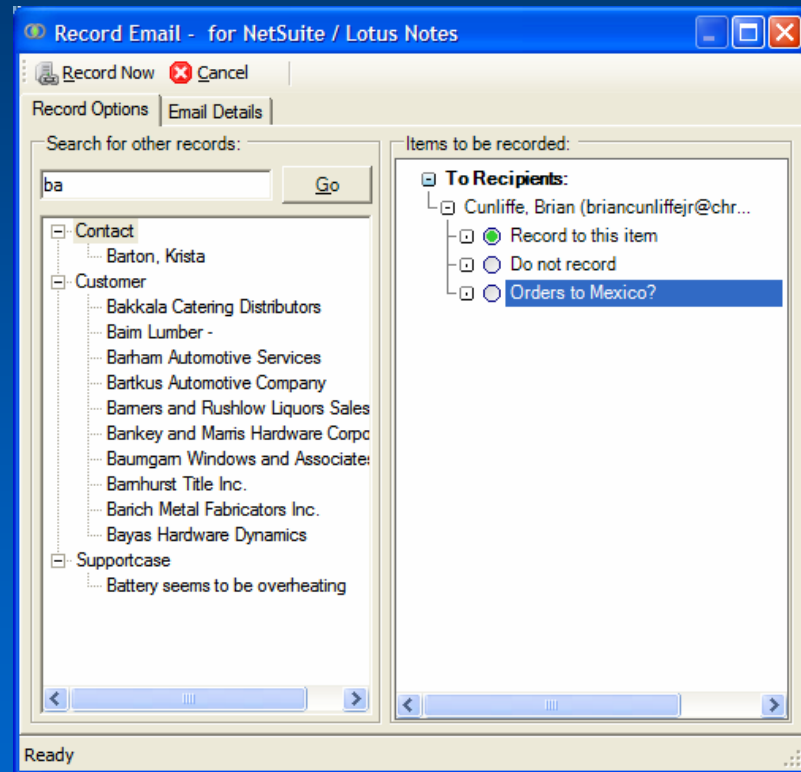
Cunliffe, Brian (Contact)  
Computer Training Associates  
briancunliffejr@christyscatering.com

Ok Cancel

Ready

# LinkPoint Record e-mail

- Once your e-mail is complete, you can send it via Lotus Notes and store it in NetSuite CRM.
- You can search and choose to record your e-mail on a business entity in NetSuite CRM. (Account, Contact, Opportunity, or Case)
- If there are attachments, you can select whether to store them in NetSuite CRM.



# Email Recorded in NetSuite CRM

- Once the email has been sent and recorded to NetSuite CRM, the e-mail can be viewed in the “History” list.

The screenshot displays the NetSuite CRM interface for a contact named Brian Cunliffe. The interface is viewed through Microsoft Internet Explorer. The browser's address bar shows the URL: <https://system.netsuite.com/app/common/entity/contact.nl?id=179>. The NetSuite logo is visible at the top left, and the user is logged in as Nartx Dokhgan (Sales Manager) for Wolfe Electronics.

The contact details for Brian Cunliffe are as follows:

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

Below the contact details, there are buttons for **Edit**, **New**, **Print**, and **Show Activity**.

The **Messages** tab is selected, showing a list of recorded emails. The table below shows the details of the recorded email:

#	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>

# ***LinkPoint Synchronization Capabilities...***

- **Synchronize Calendars, Contacts and Tasks**
- **Either bi-directional or a single direction synchronization.**
- **Synchronization can run either manually or automatically.**

# ***Calendar Synchronization***

- LinkPoint will synchronize all Calendar entries for the past 30 days and 365 future days.
- To prevent private Calendar entries in Lotus Notes from synchronizing to NetSuite CRM, check the “Mark Private” checkbox.

# Calendar Synch Summary

- Once LinkPoint evaluates the Calendar entries in both Lotus Notes and NetSuite CRM, if there are any changes, LinkPoint will display the Calendar Summary Screen.
- This screen identifies how LinkPoint will synchronize the Calendar entries between the two systems.

Sync Summary - LinkPoint for NetSuite / Lotus Notes

### Calendar Summary

Summary: (1 items)

NetSuite			Lotus Notes	
Subject	Start Time	Action	Subject	Start Date/Time
repeat	2/28/2007 2:00:00 AM	+>		

Details:

NetSuite Details		Lotus Notes Details	
Field Name	Value	Field Name	Value
Subject	repeat		
Start Time	2/28/2007 2:00:00 AM		
End Time	2/28/2007 3:00:00 AM		
Description			
Location	my desk		
All Day Event			

Show Detail Pane

Apply Cancel

# *Contact Synchronization*

- LinkPoint synchronizes Contacts from NetSuite CRM in which the user is the owner for.
- LinkPoint only synchronizes Contacts from Lotus Notes that have a category of “CRM”. This prevents any personal contacts in Lotus Notes from being synchronized to NetSuite CRM.

# ***Task Synchronization***

- LinkPoint will synchronize all Task entries for the past 30 days and 365 future days.
- To prevent private Task entries in Lotus Notes from synchronizing to NetSuite CRM, check the “Mark Private” checkbox.

# Questions & Answers

## Why use LinkPoint?

- LinkPoint is integrated into your Lotus Notes software.
- LinkPoint supports Connected and Island Modes in Lotus Notes.

## Is LinkPoint installed on the Domino Server or user Workstation?

- LinkPoint is installed only on the user's workstation and only requires a mail template change if the organization chooses.

## What are the LinkPoint Requirements?

- Lotus Notes Release 5.05 or greater.

## What business entities in NetSuite CRM can I record to?

- Account, Contact, Opportunity, or Case.

# ***Contact Information***

LinkPoint360

64A White Street

Red Bank, New Jersey 07701

Sales: 732-212-8402

Support: 732-212-8403

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

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