

LinkPoint for NetSuite CRM

Data Synchronization Tutorial

Lotus Notes Edition



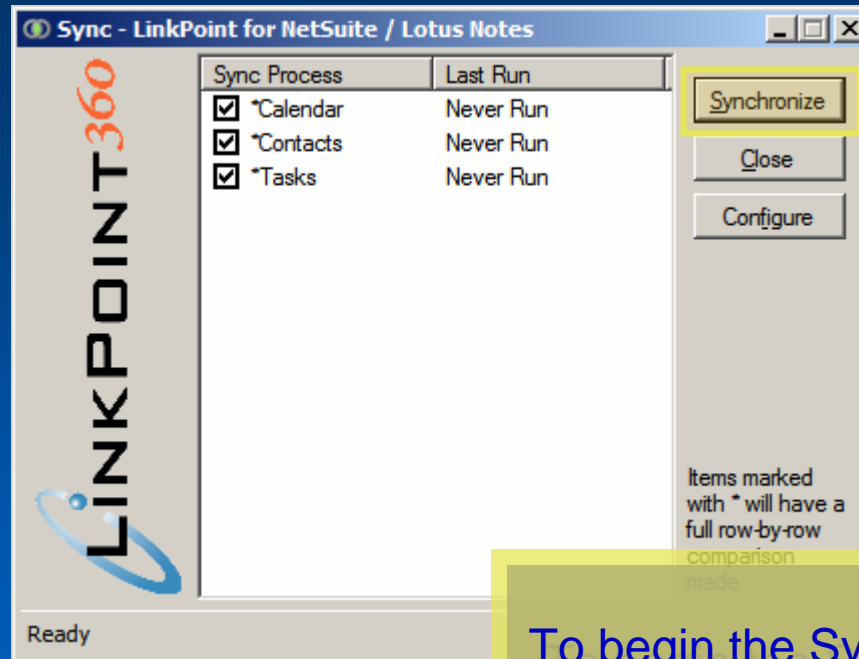
LinkPoint Synchronization Capabilities...

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

How To Manually Start LinkPoint Synchronization



To manually launch the LinkPoint Synchronization program, Double Click the LinkPoint icon in the system tray.

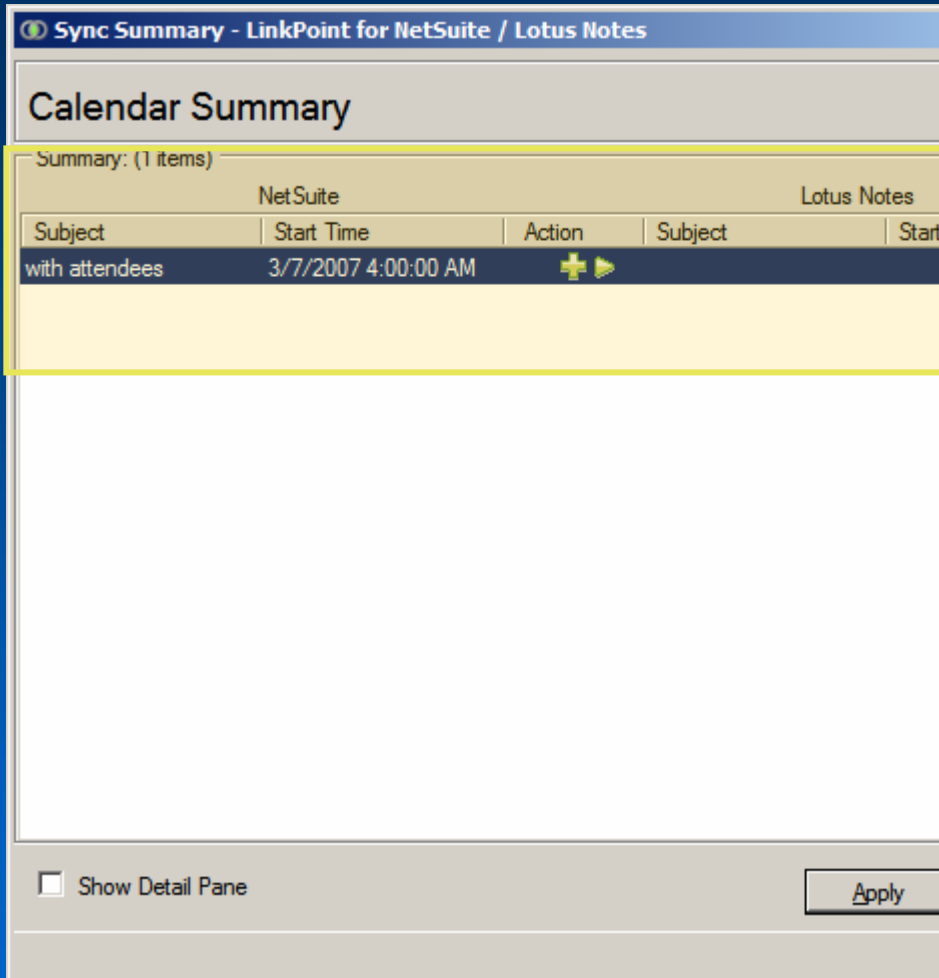


To begin the Synchronization, click the Synchronize Button. LinkPoint will synchronize each of the selected items.

Please note that the first time you run the synchronization, LinkPoint will compare data in both systems to identify what data needs to be synchronized.

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 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.

Action Key

- Delete From NetSuite CRM
- Delete From NetSuite CRM
- Add to Lotus Notes
- Add To NetSuite CRM
- Update Lotus Notes
- Update NetSuite CRM

If you approve of the actions that LinkPoint will perform, click the Apply button.

Sync Summary - LinkPoint for NetSuite / Lotus Notes

Calendar Summary

Summary: (1 items)

NetSuite			Lotus Notes	
Subject	Start Time	Action	Subject	Start Date/Time
with attendees	3/7/2007 4:00:00 AM	+ ▶		

Details:

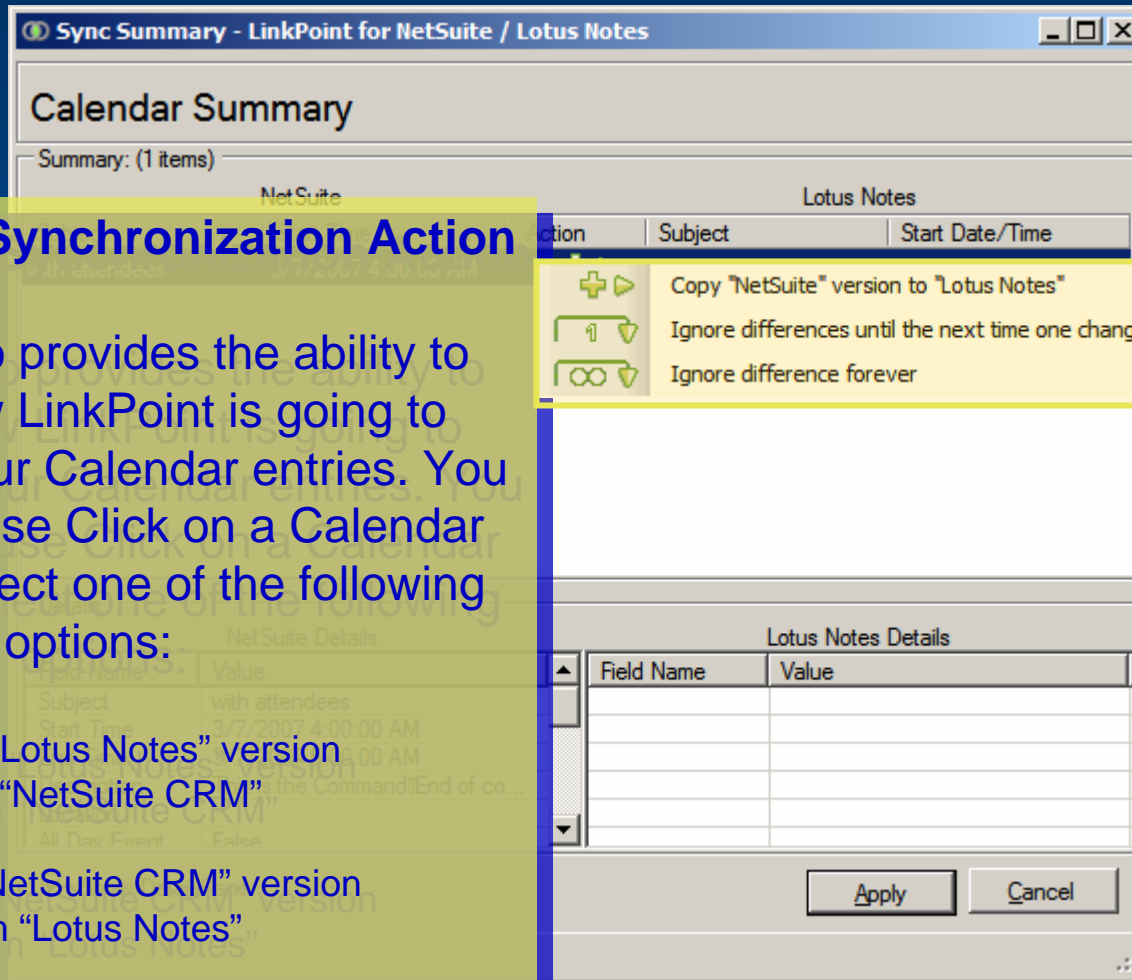
NetSuite Details			Lotus Notes Details	
Field Name	Value		Field Name	Value
Subject	with attendees			
Start Time	3/7/2007 4:00:00 AM			
End Time	3/7/2007 5:00:00 AM			
Description	This is the Command!End of co...			
Location				
All Day Event	False			

Show Detail Pane

Apply Cancel

Show Detail Pane

By clicking the Show Detail Pane checkbox, you can see the details of the data in both systems.



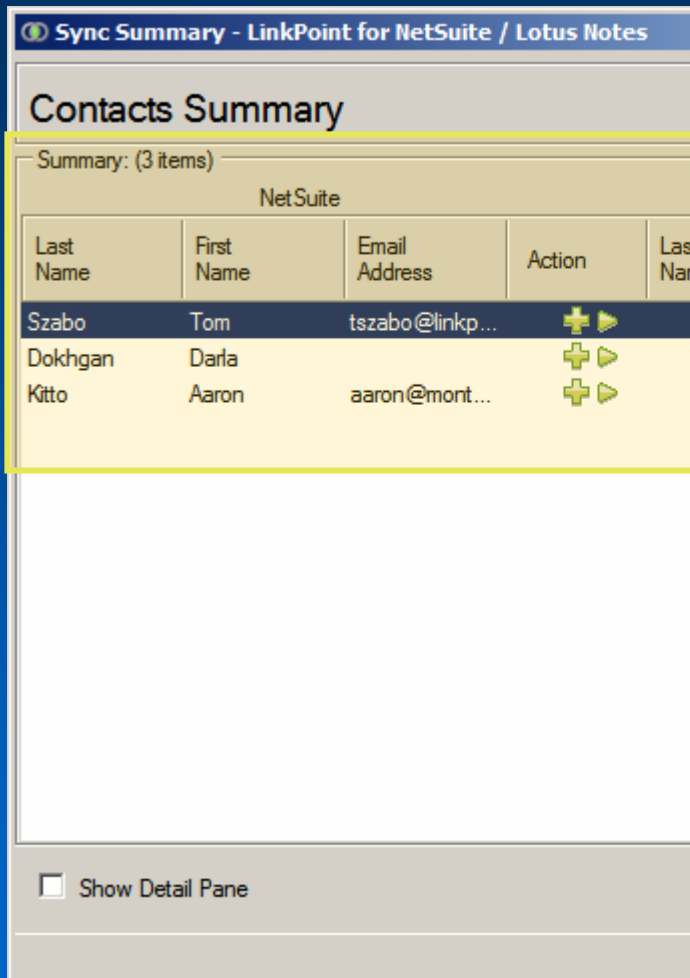
Changing the Synchronization Action

LinkPoint also provides the ability to override how LinkPoint is going to synchronize your Calendar entries. You can Right Mouse Click on a Calendar record and select one of the following options:

- Update “Lotus Notes” version from “NetSuite CRM”
- Update “NetSuite CRM” version from “Lotus Notes”
- Ignore differences until the next time one changes
- Ignore differences forever

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.









Contacts Summary

Once LinkPoint evaluates the Contact entries in both Lotus Notes and NetSuite CRM, if there are any changes, LinkPoint will display the Contacts Summary Screen.

This screen identifies how LinkPoint will synchronize the Contacts between the two systems.

System Action Key

-  Delete From NetSuite CRM
-  Delete From NetSuite CRM
-  Add to Lotus Notes
-  Add To NetSuite CRM
-  Update Lotus Notes
-  Update NetSuite CRM

If you approve of the actions that LinkPoint will perform, click the Apply button.

Sync Summary - LinkPoint for NetSuite / Lotus Notes

Contacts Summary

Summary: (3 items)

NetSuite				Lotus Notes		
Last Name	First Name	Email Address	Action	Last Name	First Name	Internet Email Address
Szabo	Tom	tszabo@linkp...	+ ➡			
Dokhgan	Darla		+ ➡			
Kitto	Aaron	aaron@mont...	+ ➡			

Details:

NetSuite Details			Lotus Notes Details	
Field Name	Value		Field Name	Value
Salutation				
First Name	Tom			
Middle Name				
Last Name	Szabo			
Email Address	tszabo@linkpoint360.com			
Comments				

Show Detail Pane

Apply Cancel

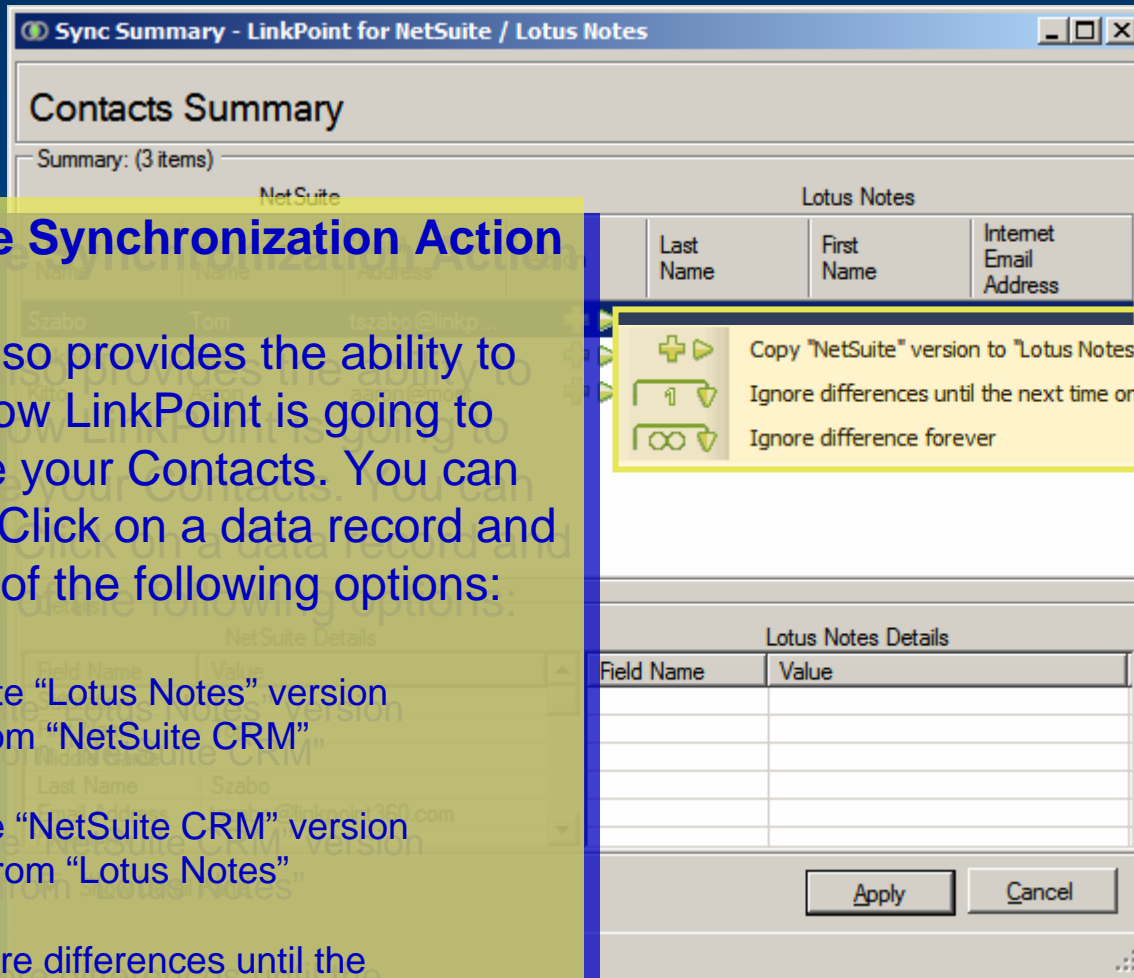
Show Detail Pane

By clicking the Show Detail Pane checkbox, you can see the details of the data in both systems.

Changing the Synchronization Action

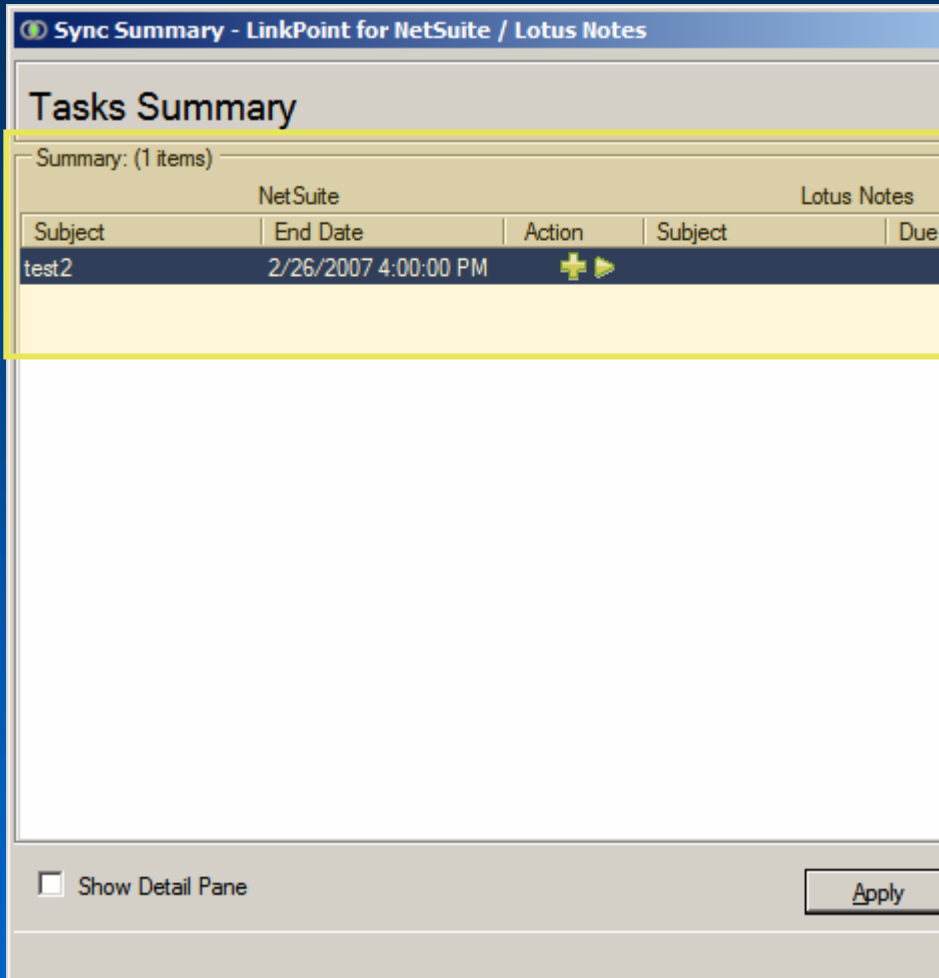
LinkPoint also provides the ability to override how LinkPoint is going to synchronize your Contacts. You can Right Mouse Click on a data record and select one of the following options:

- Update "Lotus Notes" version from "NetSuite CRM"
- Update "NetSuite CRM" version from "Lotus Notes"
- Ignore differences until the next time one changes
- Ignore differences forever



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.









Tasks Summary

Once LinkPoint evaluates the Task entries in both Lotus Notes and NetSuite CRM, if there are any changes, LinkPoint will display the Tasks Summary Screen.

This screen identifies how LinkPoint will synchronize the Tasks entries between the two systems.

Action Key

-  Delete From NetSuite CRM
-  Delete From NetSuite CRM
-  Add to Lotus Notes
-  Add To NetSuite CRM
-  Update Lotus Notes
-  Update NetSuite CRM

If you approve of the actions that LinkPoint will perform, click the Apply button.

Sync Summary - LinkPoint for NetSuite / Lotus Notes

Tasks Summary

Summary: (1 items)

NetSuite			Lotus Notes	
Subject	End Date	Action	Subject	Due Date
test2	2/26/2007 4:00:00 PM	+ ▶		

Details:

NetSuite Details			Lotus Notes Details	
Field Name	Value		Field Name	Value
Subject	test2			
Start Date	2/26/2007 4:00:00 PM			
End Date	2/26/2007 4:00:00 PM			
Status	_inProgress			
Message				
Priority	high			

Show Detail Pane

Apply Cancel

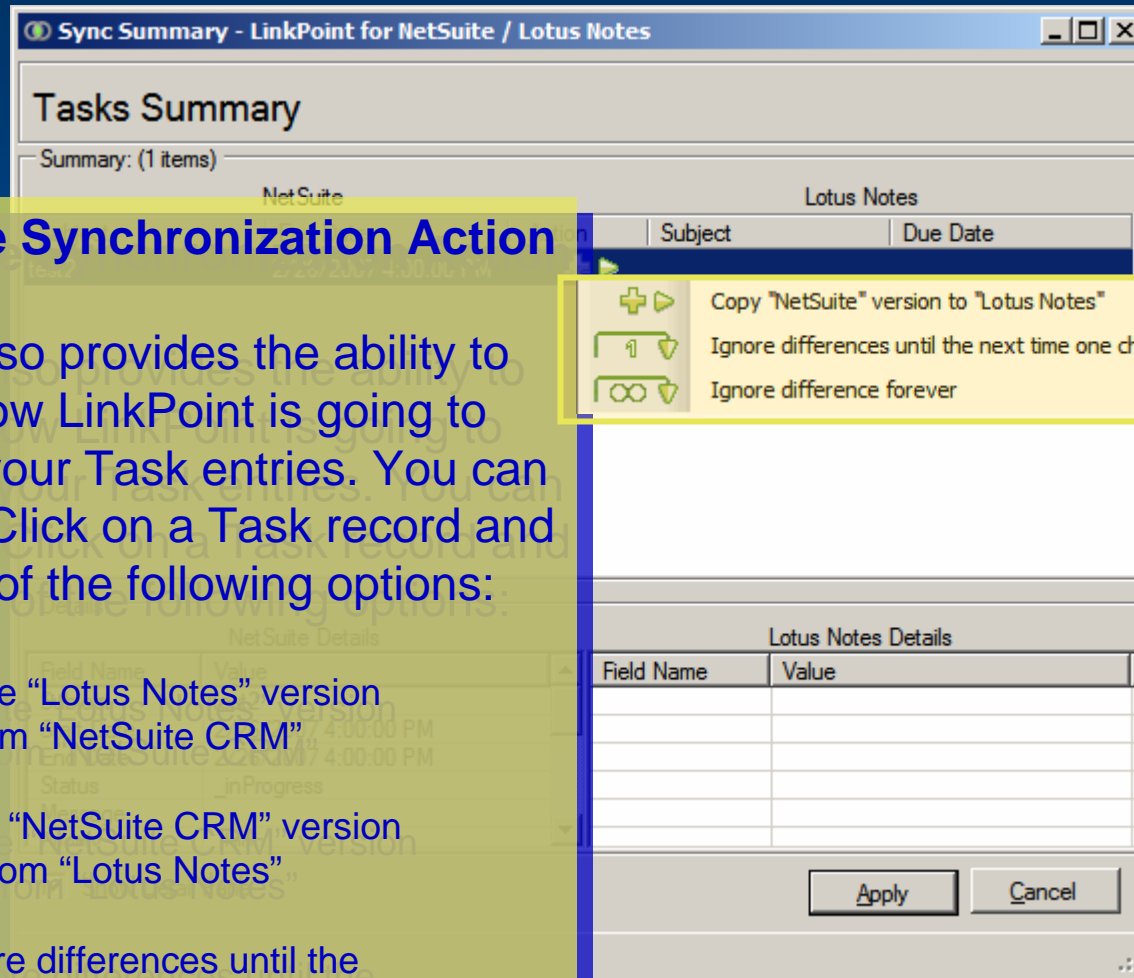
Show Detail Pane

By clicking the Show Detail Pane checkbox, you can see the details of the data in both systems.

Changing the Synchronization Action

LinkPoint also provides the ability to override how LinkPoint is going to synchronize your Task entries. You can Right Mouse Click on a Task record and select one of the following options:

- Update "Lotus Notes" version from "NetSuite CRM"
- Update "NetSuite CRM" version from "Lotus Notes"
- Ignore differences until the next time one changes
- Ignore differences forever



Contact Information

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

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