

# *LinkPoint for SageCRM*

Data Synchronization Tutorial

Lotus Notes Edition



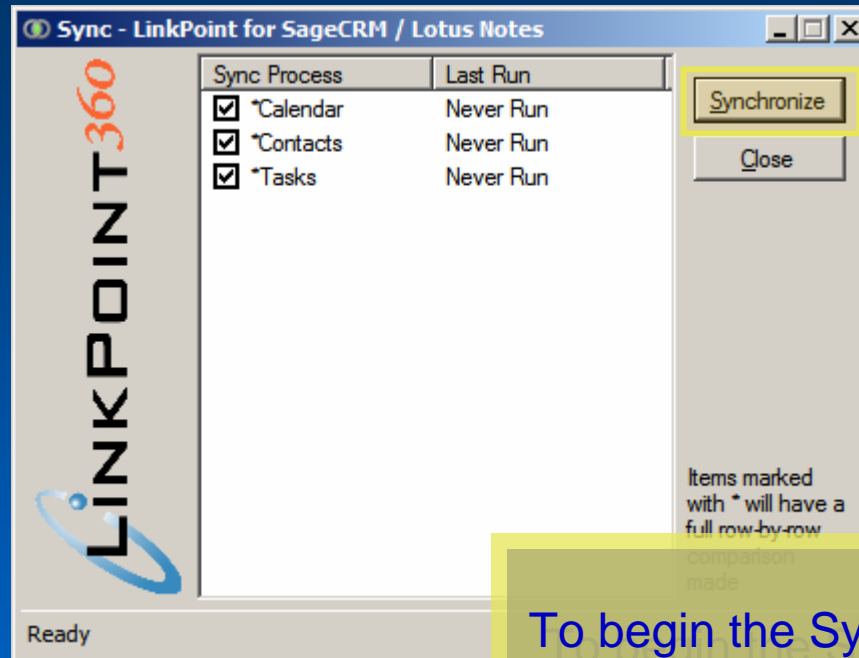
# ***LinkPoint Synchronization Capabilities...***

- **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.

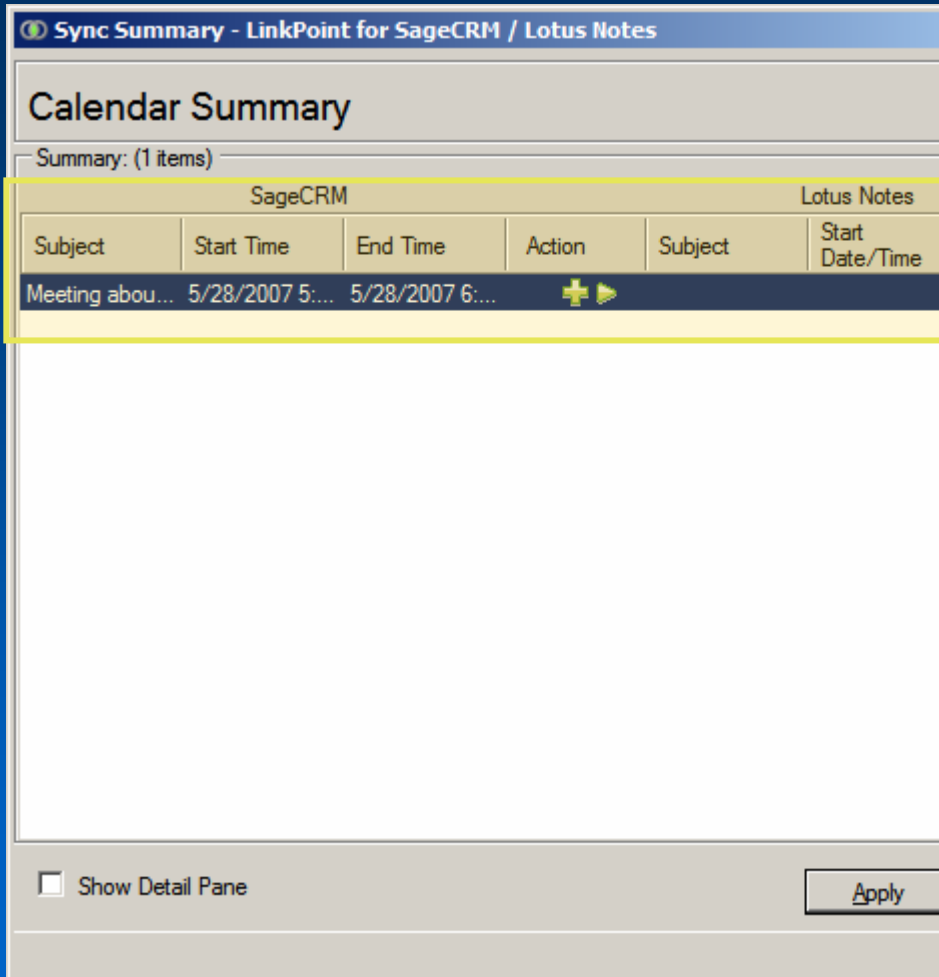


To begin the Synchronization, click the Synchronize Button. LinkPoint will synchronize each of the selected items.

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 SageCRM, check the “Mark Private” checkbox.









## Calendar Summary

Once LinkPoint evaluates the Calendar entries in both Lotus Notes and SageCRM, 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 SageCRM
-  Delete From Lotus Notes
-  Add to Lotus Notes
-  Add To SageCRM
-  Update Lotus Notes
-  Update SageCRM

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

**Sync Summary - LinkPoint for SageCRM / Lotus Notes**

### Calendar Summary

Summary: (1 items)

SageCRM				Lotus Notes		
Subject	Start Time	End Time	Action	Subject	Start Date/Time	End Date/Time
Meeting about...	5/28/2007 5:...	5/28/2007 6:...	+ ▶			

Details:

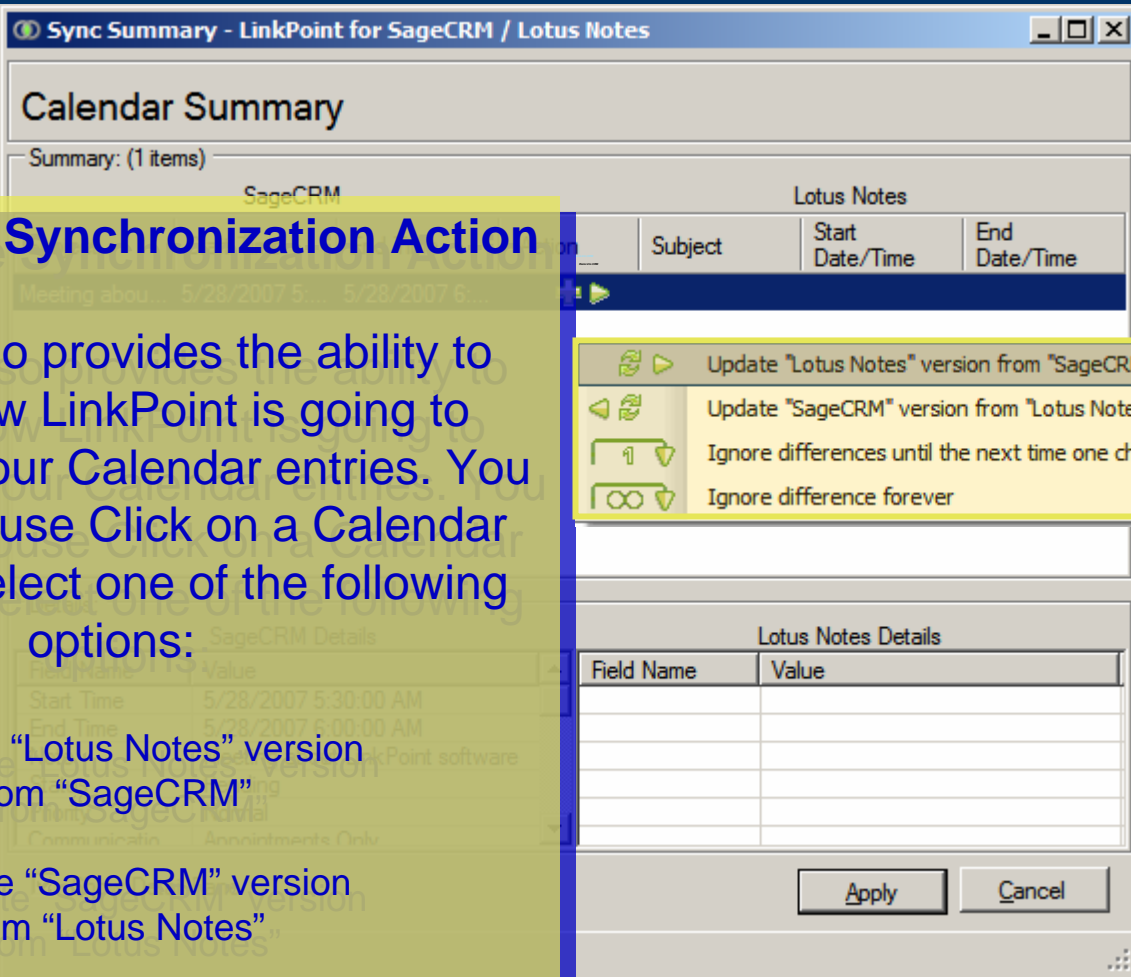
SageCRM Details			Lotus Notes Details	
Field Name	Value		Field Name	Value
Start Time	5/28/2007 5:30:00 AM			
End Time	5/28/2007 6:00:00 AM			
Note	Meeting about LinkPoint software			
Status	Pending			
Priority	Normal			
Communicatio	Appointments Only			

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

# *Contact Synchronization*

- LinkPoint synchronizes Contacts from SageCRM which exist in the My CRM group.
- 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 SageCRM.

Sync Summary - LinkPoint for SageCRM / Lotus Notes

### Contacts Summary

Summary: (6 items)

SageCRM

Last Name	First Name	Email Address 1	Action
Anderson	Yaukena	Yaukena.And...	+ ▶
Allen	Zack	Zack.Allen@...	+ ▶
Akester	William	William.Akest...	+ ▶
Agnew	William	William.Agne...	+ ▶
Aldrich	William	William.Aldric...	+ ▶
Allred	Alan	alan@linkpoi...	+ ▶

Details:

SageCRM Details

Field Name	Value
Salutation	
First Name	Yaukena
Middle Name	P
Last Name	Anderson
suffix	
.Job Title	Marketing







Show Detail Pane

## Contacts Summary

Once LinkPoint evaluates the Contact entries in both Lotus Notes and SageCRM, 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 SageCRM
-  Delete From SageCRM
-  Add to Lotus Notes
-  Add To SageCRM
-  Update Lotus Notes
-  Update SageCRM

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

**Sync Summary - LinkPoint for SageCRM / Lotus Notes**

### Contacts Summary

Summary: (6 items)

SageCRM				Lotus Notes		
Last Name	First Name	Email Address 1	Action	Last Name	First Name	Internet Email Address
Anderson	Yaukena	Yaukena.And...	+ ▶			
Allen	Zack	Zack.Allen@...	+ ▶			
Akester	William	William.Akest...	+ ▶			
Agnew	William	William.Agne...	+ ▶			
Aldrich	William	William.Aldric...	+ ▶			
Allred	Alan	alan@linkpoi...	+ ▶			

Details:

SageCRM Details			Lotus Notes Details	
Field Name	Value		Field Name	Value
Salutation				
First Name	Yaukena			
Middle Name	P			
Last Name	Anderson			
suffix				
.Job Title	Marketing			

Show Detail Pane

Apply Cancel

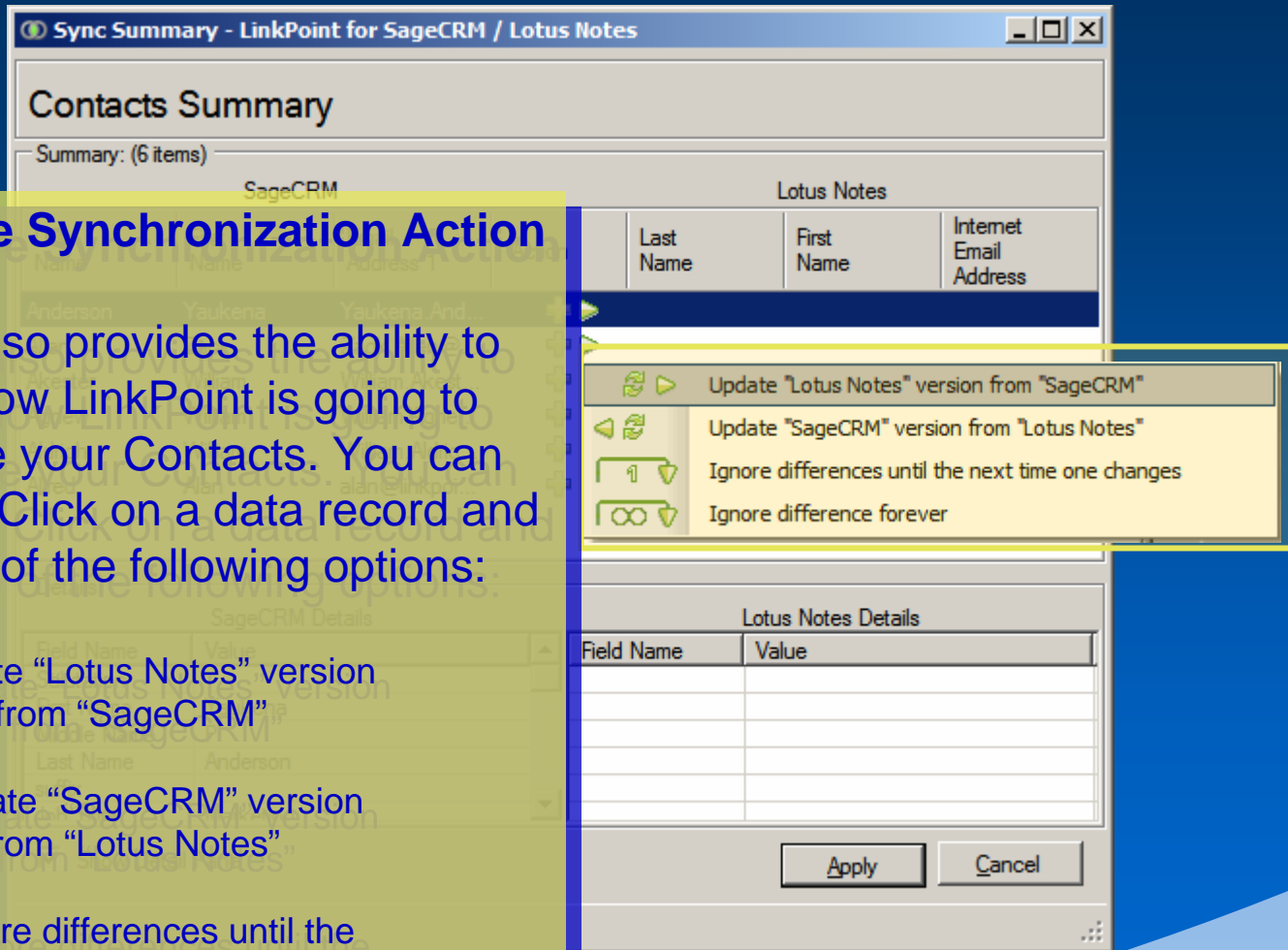
## Show Detail Pane

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

## Changing the Synchronization Action

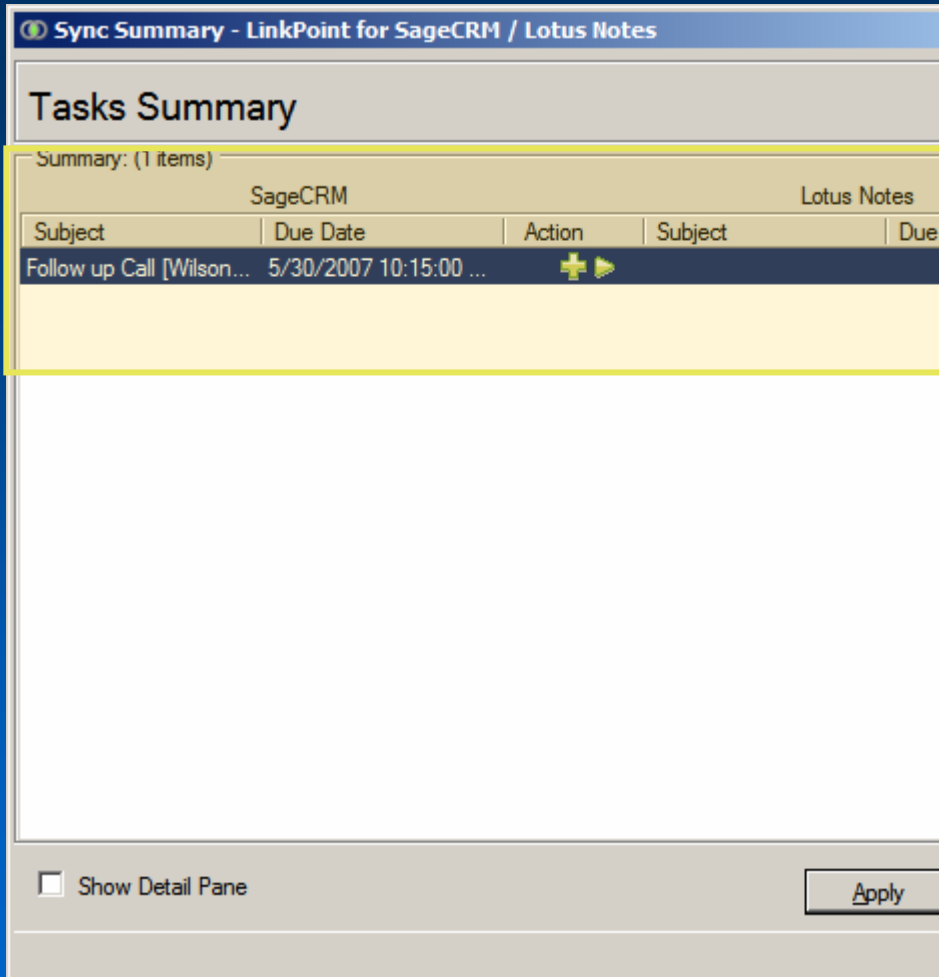
LinkPoint also provides the ability to override how LinkPoint is going to synchronize your Contacts. You can Right Mouse Click on a data record and select one of the following options:

- Update "Lotus Notes" version from "SageCRM"
- Update "SageCRM" 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 SageCRM, check the “Mark Private” checkbox.









## Tasks Summary

Once LinkPoint evaluates the Task entries in both Lotus Notes and SageCRM, 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 SageCRM
-  Delete From SageCRM
-  Add to Lotus Notes
-  Add To SageCRM
-  Update Lotus Notes
-  Update SageCRM

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

**Sync Summary - LinkPoint for SageCRM / Lotus Notes**

### Tasks Summary

Summary: (1 items)

SageCRM			Lotus Notes	
Subject	Due Date	Action	Subject	Due Date/Time
Follow up Call [Wilson...	5/30/2007 10:15:00 ...	+ ▶		

Details:

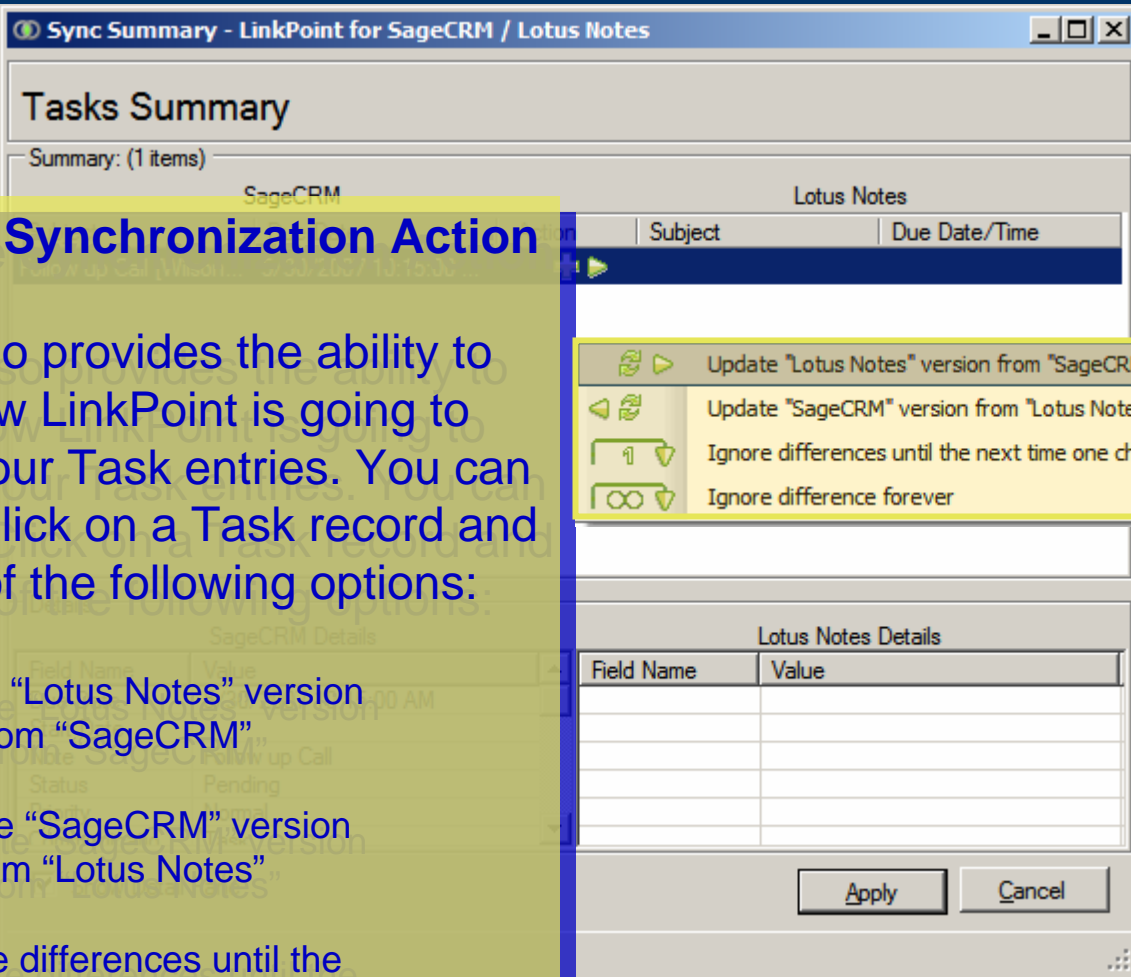
SageCRM Details			Lotus Notes Details	
Field Name	Value		Field Name	Value
Due Date	5/30/2007 10:15:00 AM			
Start Date				
Note	Follow up Call			
Status	Pending			
Priority	Normal			
Communication	Task			

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 "SageCRM"
- Update "SageCRM" 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.

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

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

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