

LinkPoint for SalesLogix

Data Synchronization Tutorial

Lotus Notes Edition

SALESLOGIX



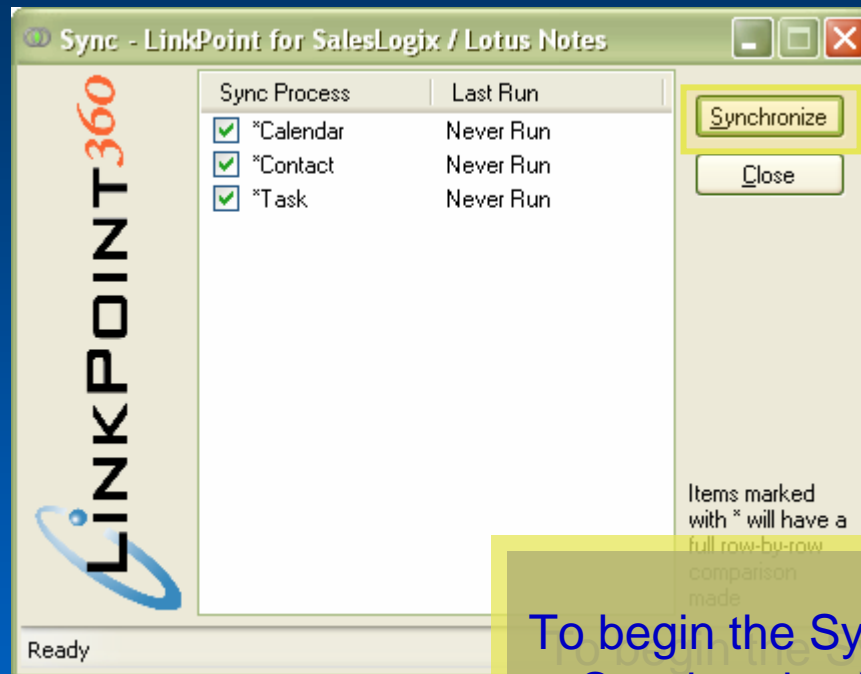
LinkPoint Synchronization Capabilities...

- **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.

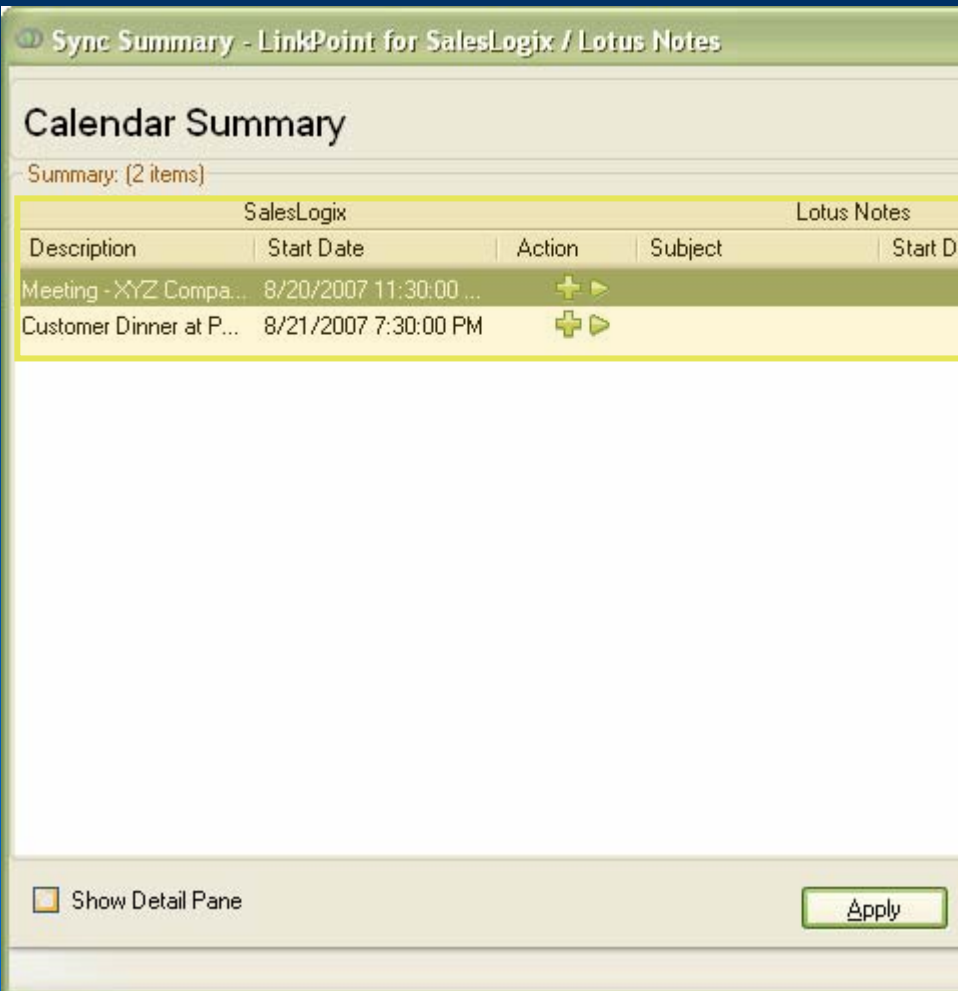


To begin the Synchronization, click the Synchronize Button. LinkPoint will synchronize each of the selected items.

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 SalesLogix, check the “Mark Private” checkbox.



Calendar Summary

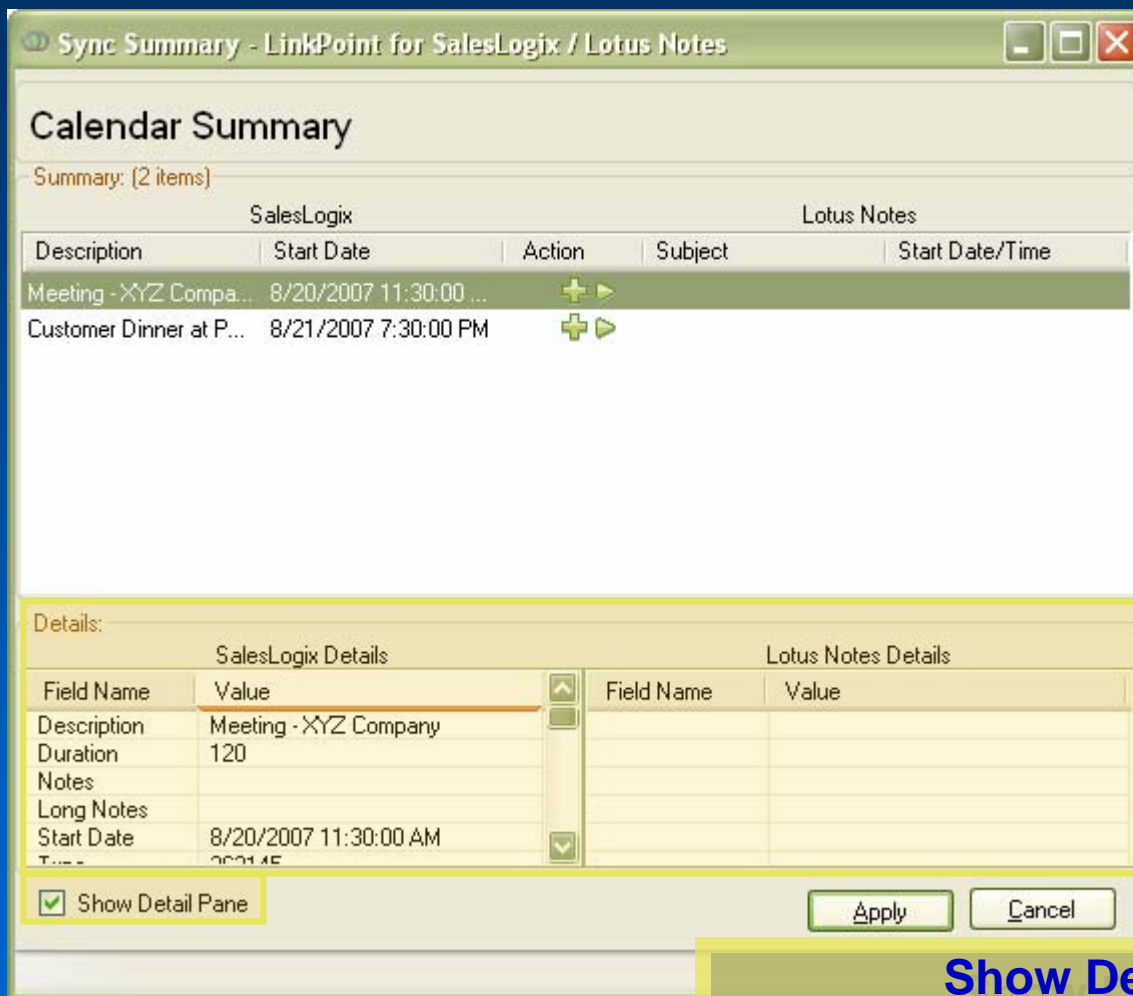
Once LinkPoint evaluates the Calendar entries in both Lotus Notes and SalesLogix, if there are any changes, LinkPoint will display the Calendar Summary Screen.

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

Action Key

- Delete From SalesLogix
- Delete From SalesLogix
- Add to Lotus Notes
- Add To SalesLogix
- Update Lotus Notes
- Update SalesLogix

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



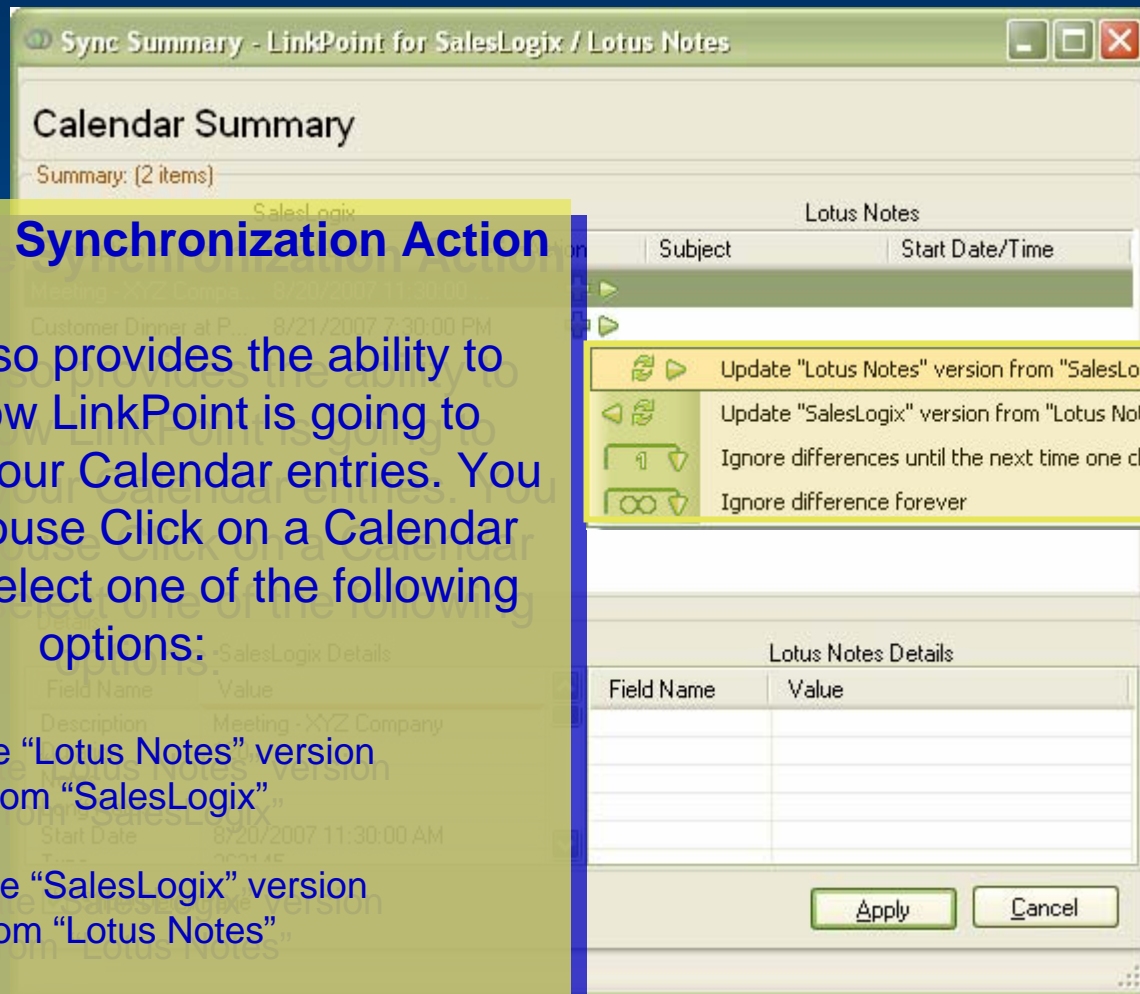
Show Detail Pane

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

Changing the Synchronization Action

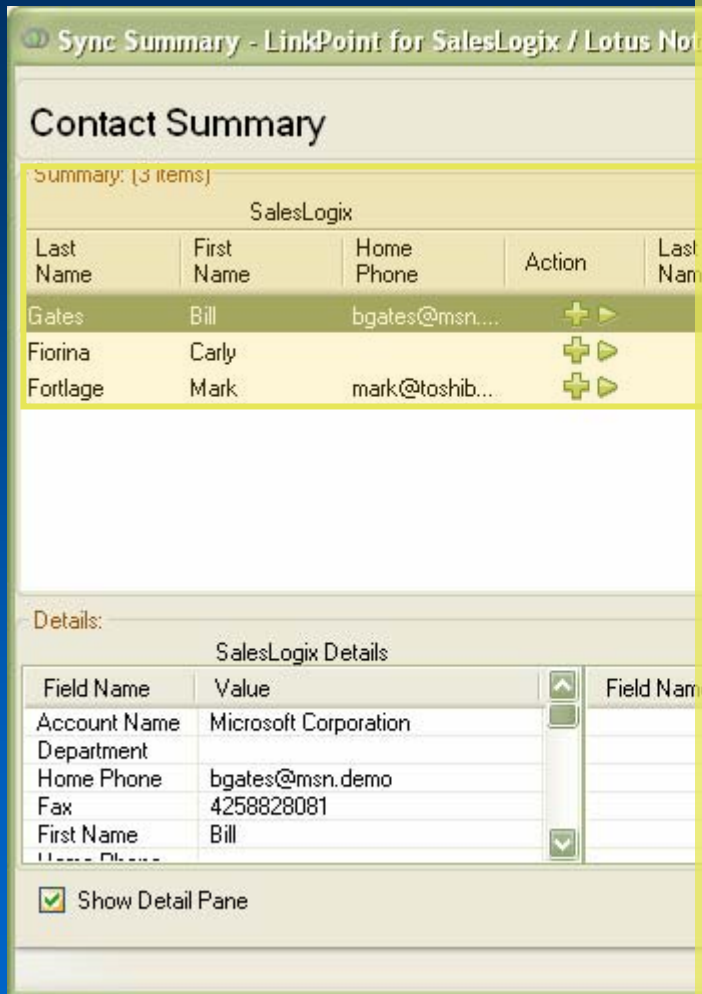
LinkPoint also provides the ability to override how LinkPoint is going to synchronize your Calendar entries. You can Right Mouse Click on a Calendar record and select one of the following options:

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



Contact Synchronization

- LinkPoint synchronizes Contacts from SalesLogix 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 SalesLogix.



Contacts Summary

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

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

Sync Summary - LinkPoint for SalesLogix / Lotus Notes

Contact Summary

Summary: (3 items)

SalesLogix				Lotus Notes		
Last Name	First Name	Home Phone	Action	Last Name	First Name	Email Address
Gates	Bill	bgates@msn...	+ >			
Fiorina	Carly		+ >			
Fortlage	Mark	mark@toshib...	+ >			

Details:

SalesLogix Details			Lotus Notes Details	
Field Name	Value		Field Name	Value
Account Name	Microsoft Corporation			
Department				
Home Phone	bgates@msn.demo			
Fax	4258828081			
First Name	Bill			
Home Phone				

Show Detail Pane

Apply Cancel

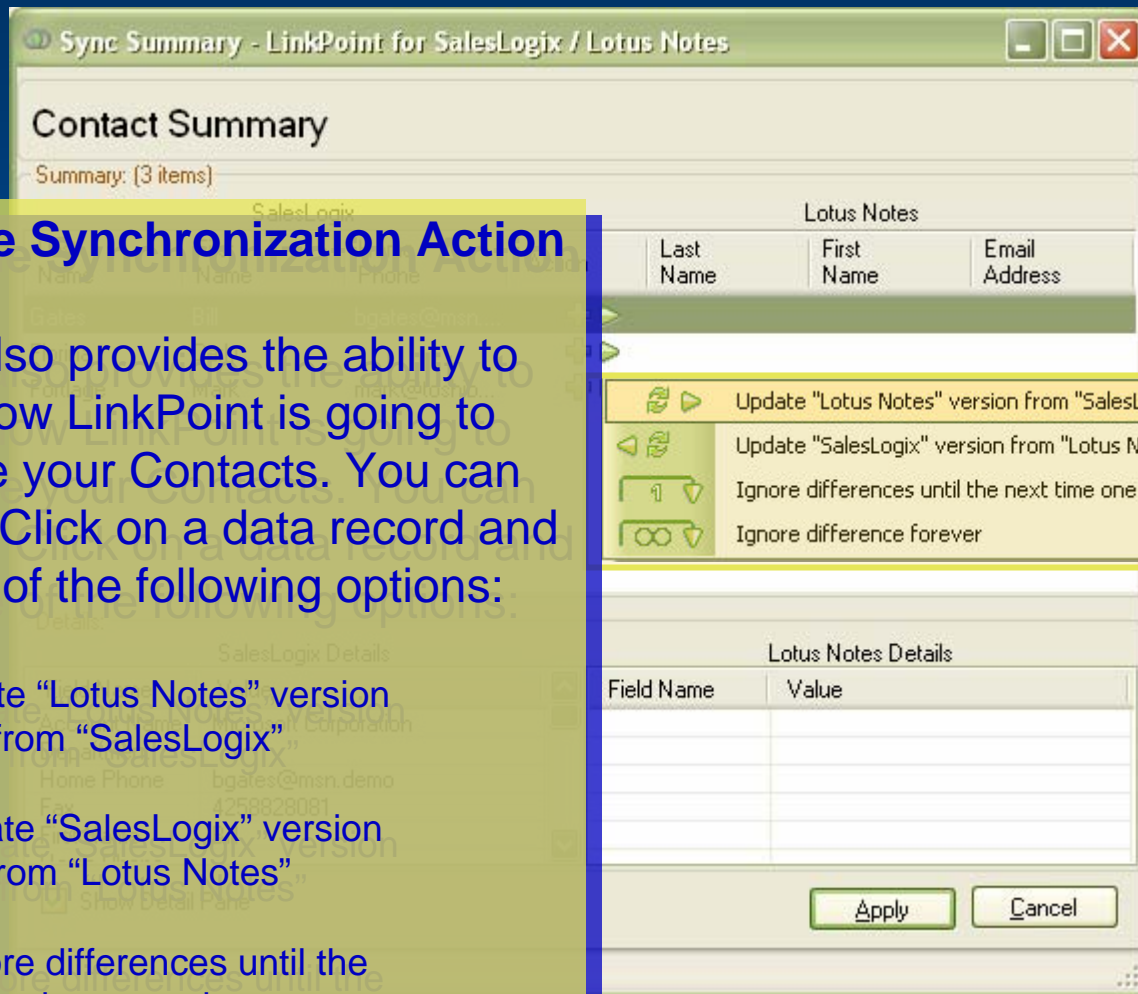
Show Detail Pane

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

Changing the Synchronization Action

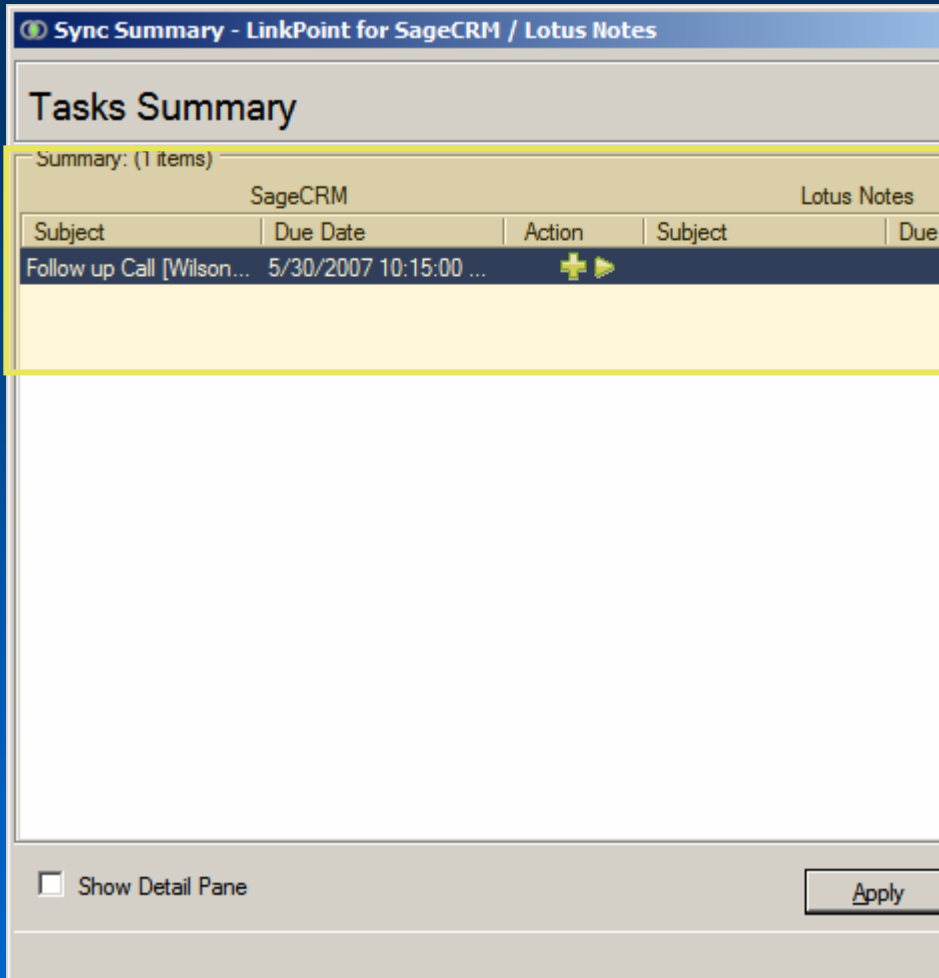
LinkPoint also provides the ability to override how LinkPoint is going to synchronize your Contacts. You can Right Mouse Click on a data record and select one of the following options:

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









Tasks Summary

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

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

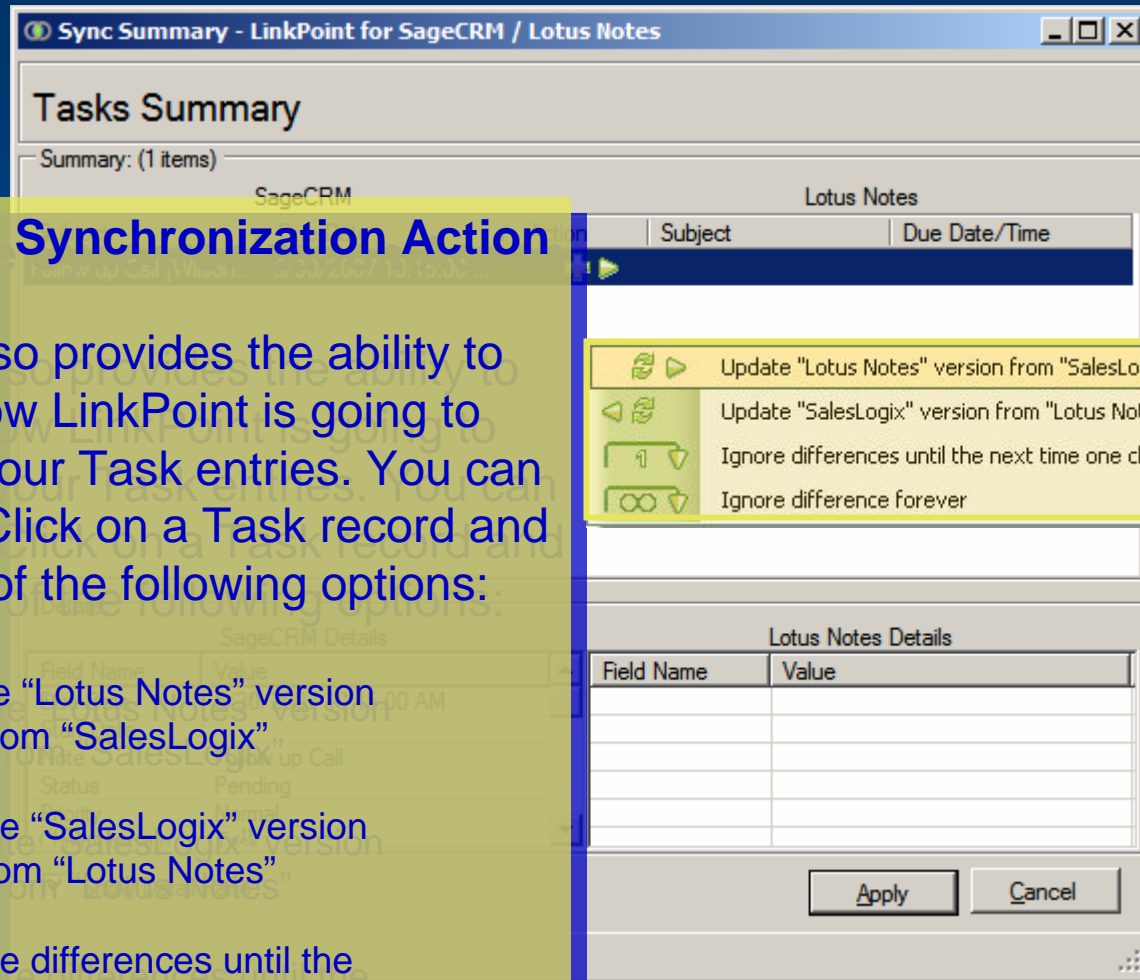
Show Detail Pane

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 "SalesLogix"
- Update "SalesLogix" 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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