

LinkPoint for salesforce.com

Email Tutorial
Lotus Notes Edition

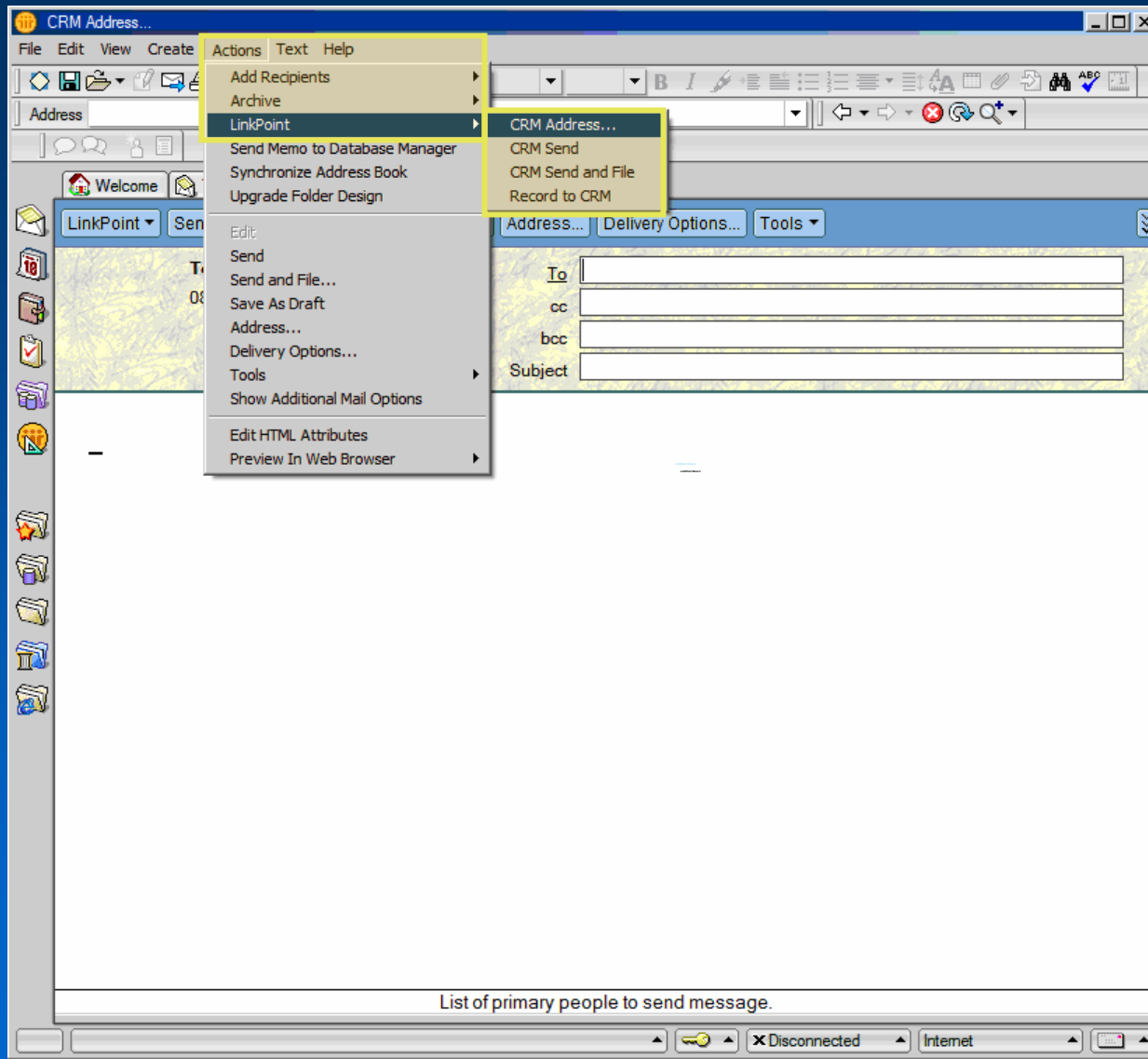


Email Tutorial Overview...

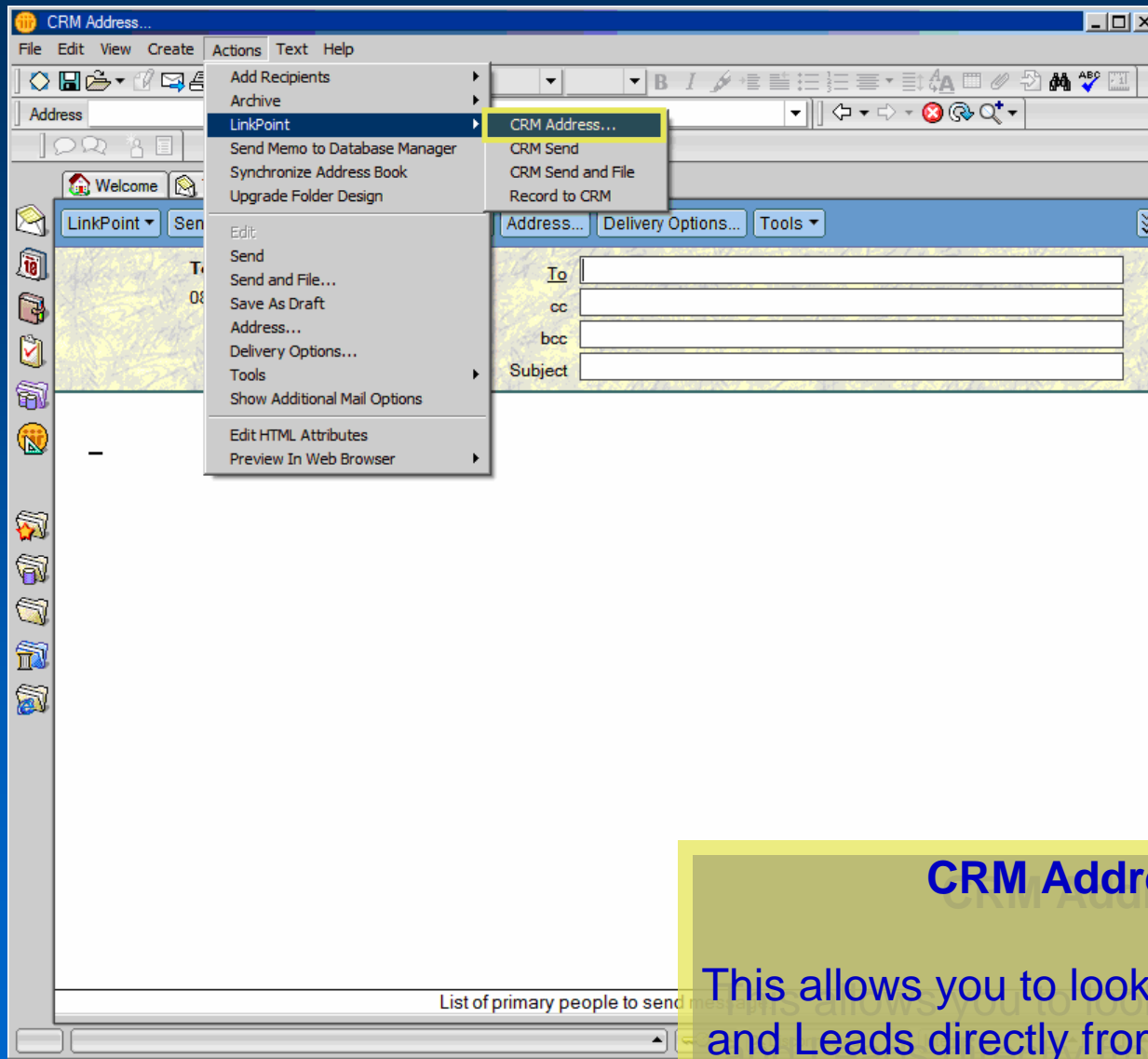
- 1. How to access LinkPoint from Lotus Notes.**
- 2. How to record an outbound email from Lotus Notes to salesforce.com.**
- 3. How to record an inbound email from Lotus Notes to salesforce.com.**

Step 1

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

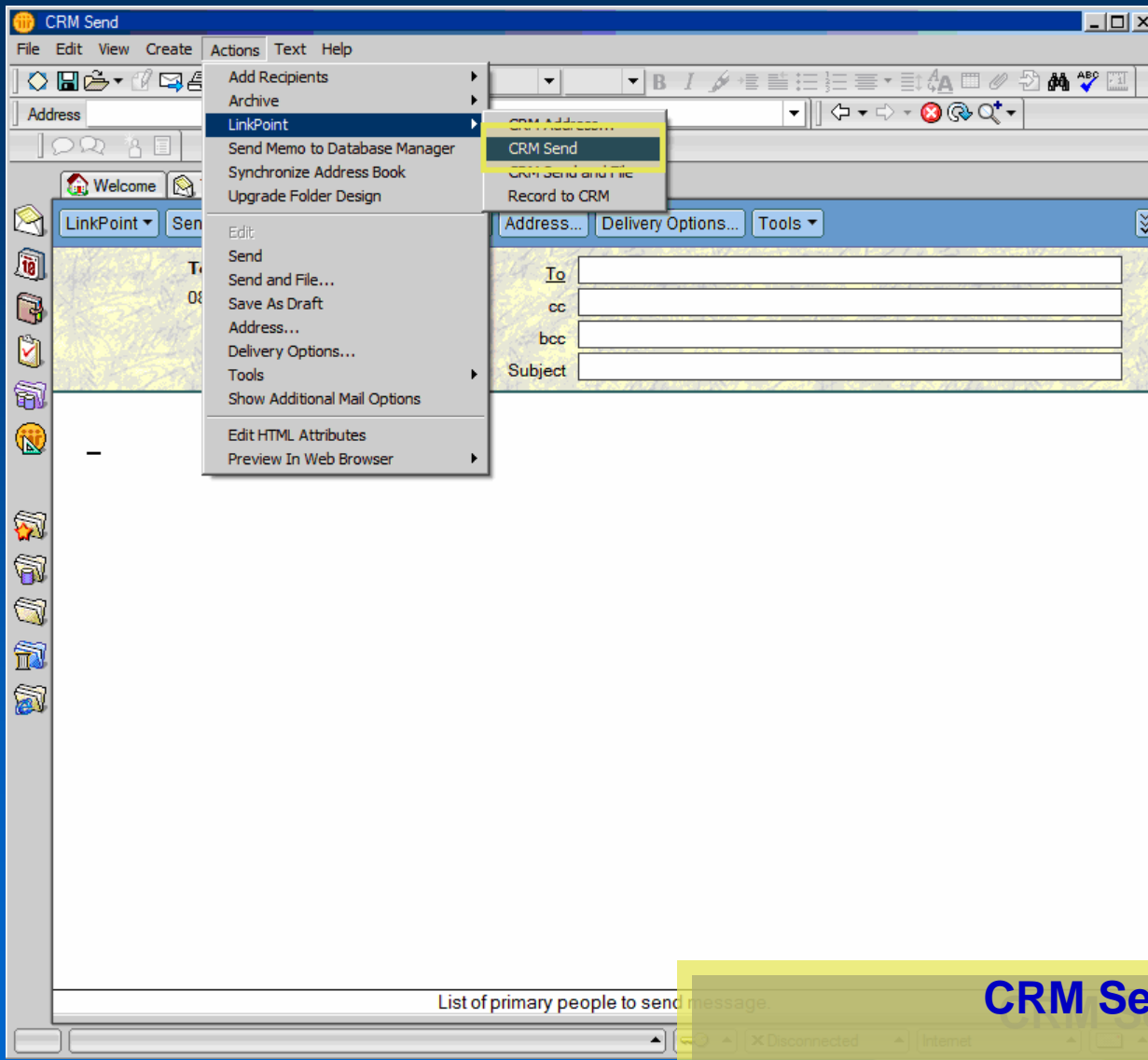


There are 4 LinkPoint menu's available from within Lotus Notes.



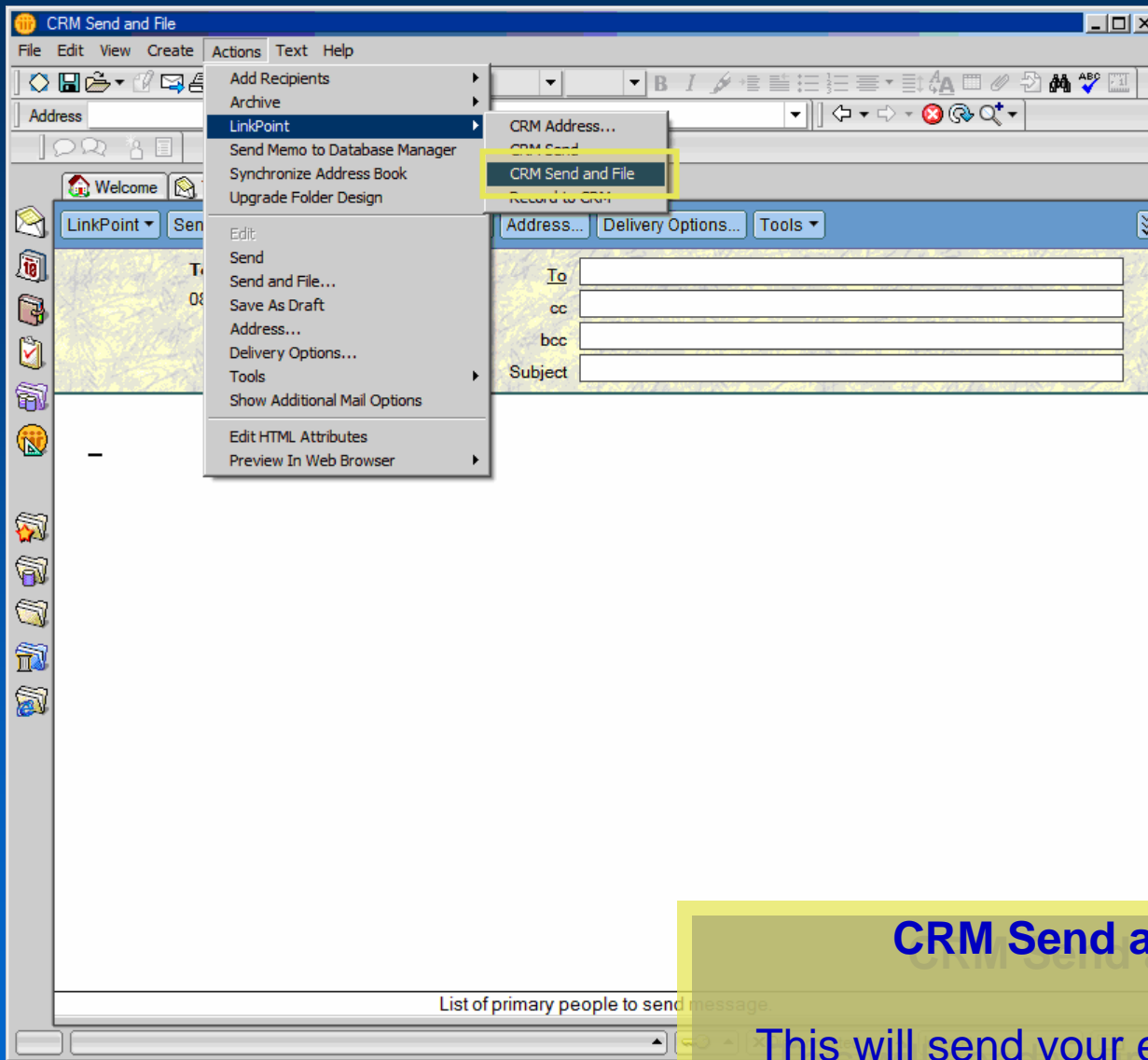
CRM Address...

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



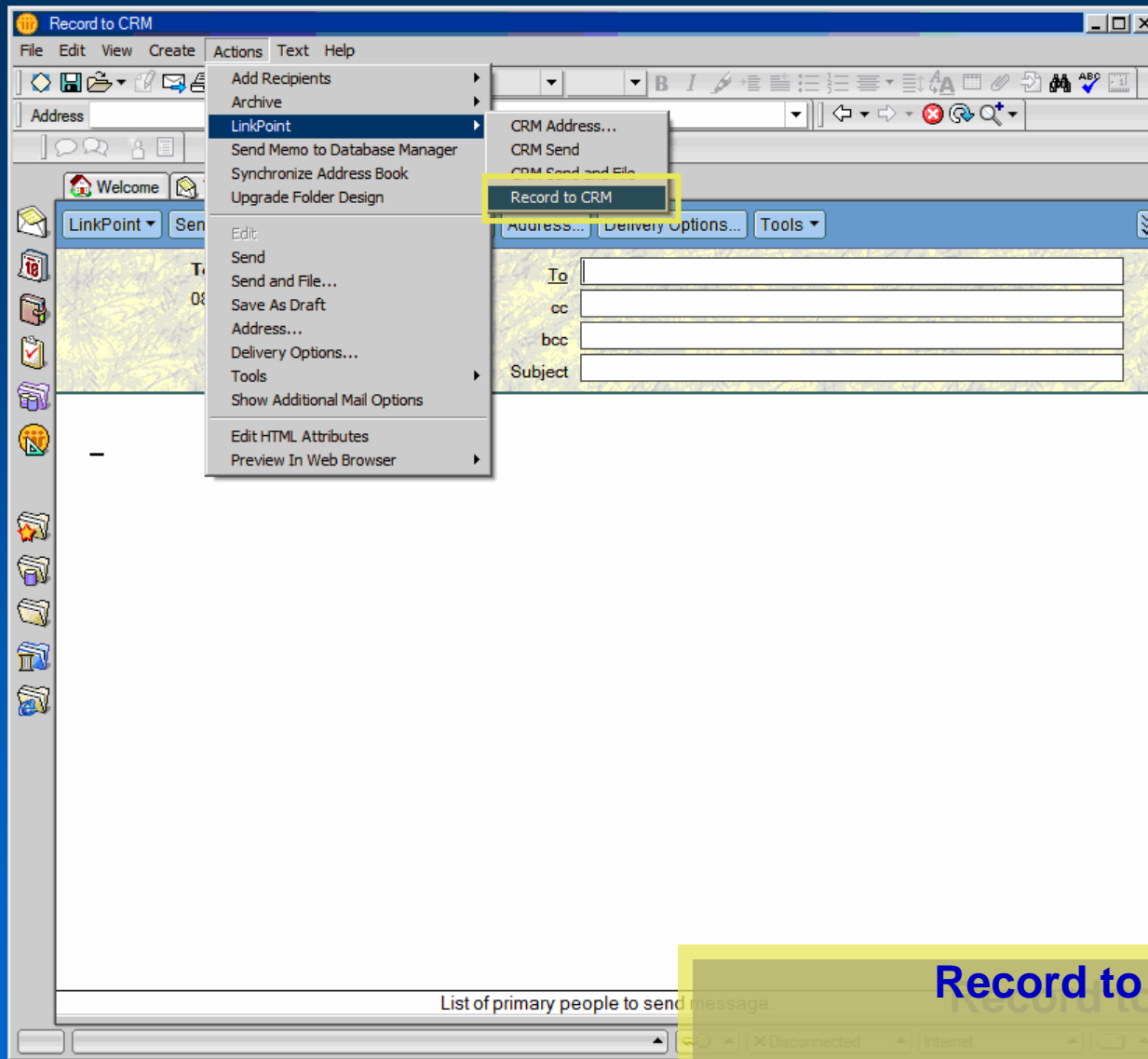
CRM Send

This will send your email via Lotus Notes and record it to salesforce.com.



CRM Send and File

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

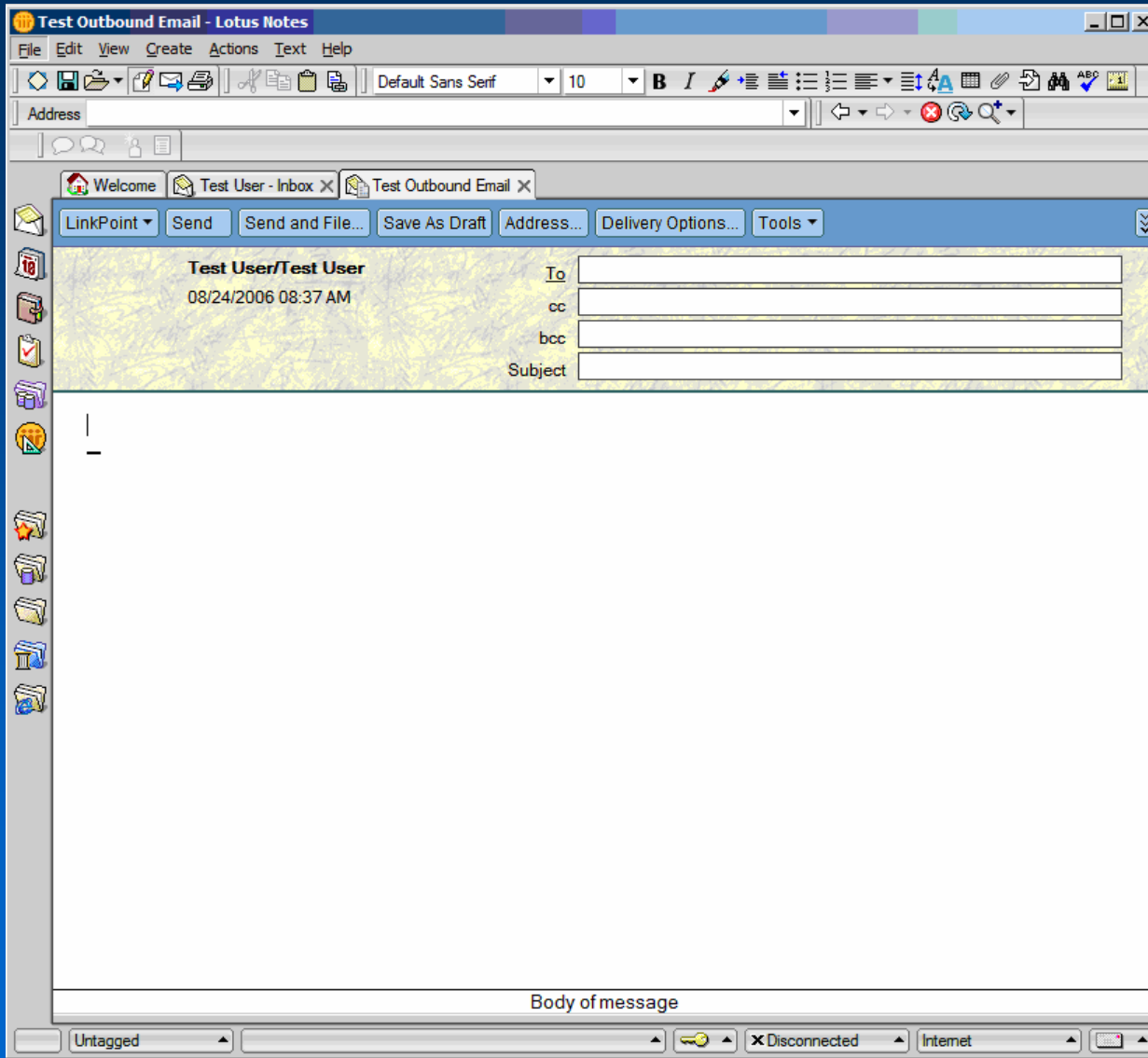


Record to CRM

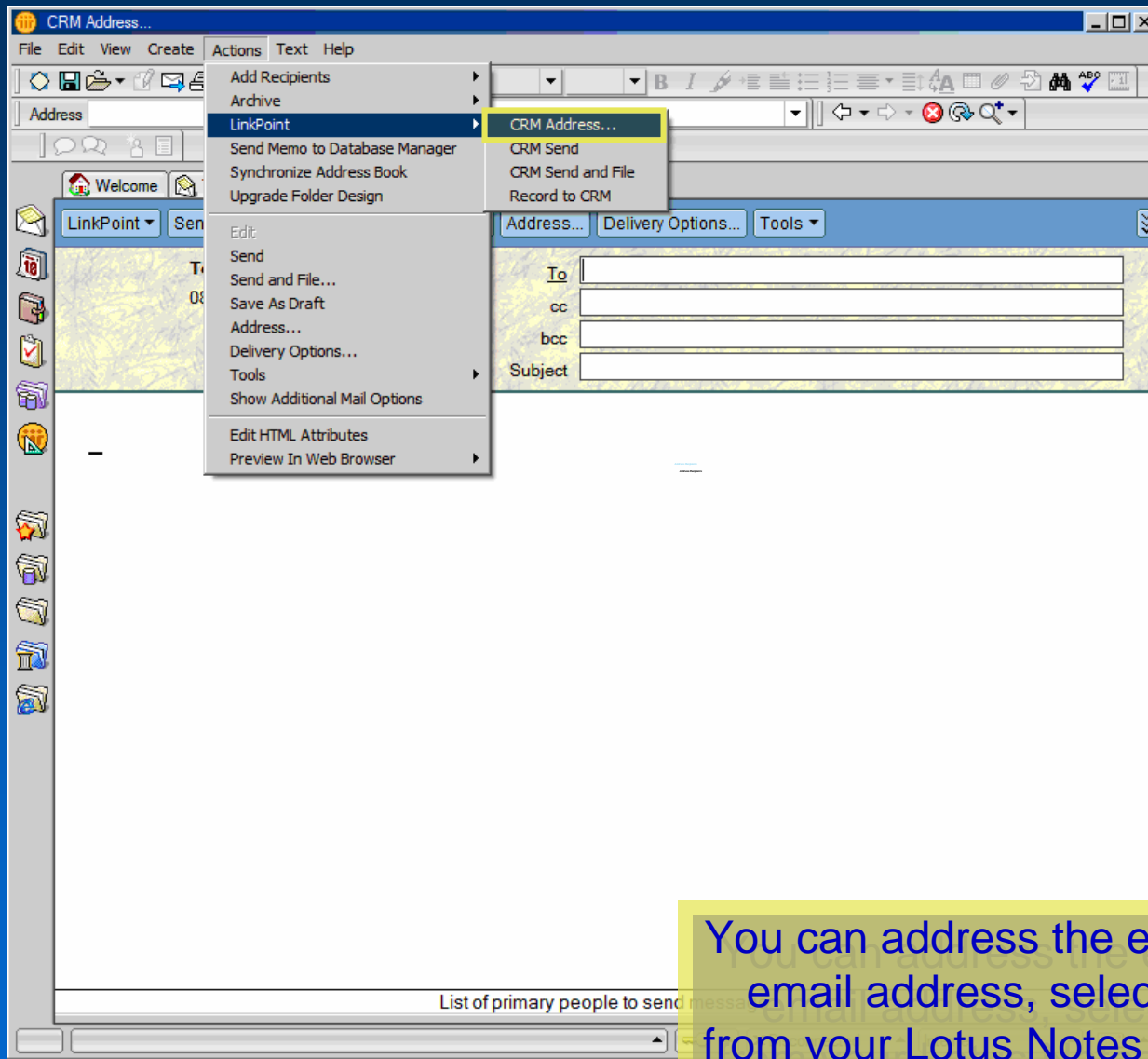
This will record an inbound email or previously sent email to salesforce.com

Step 2

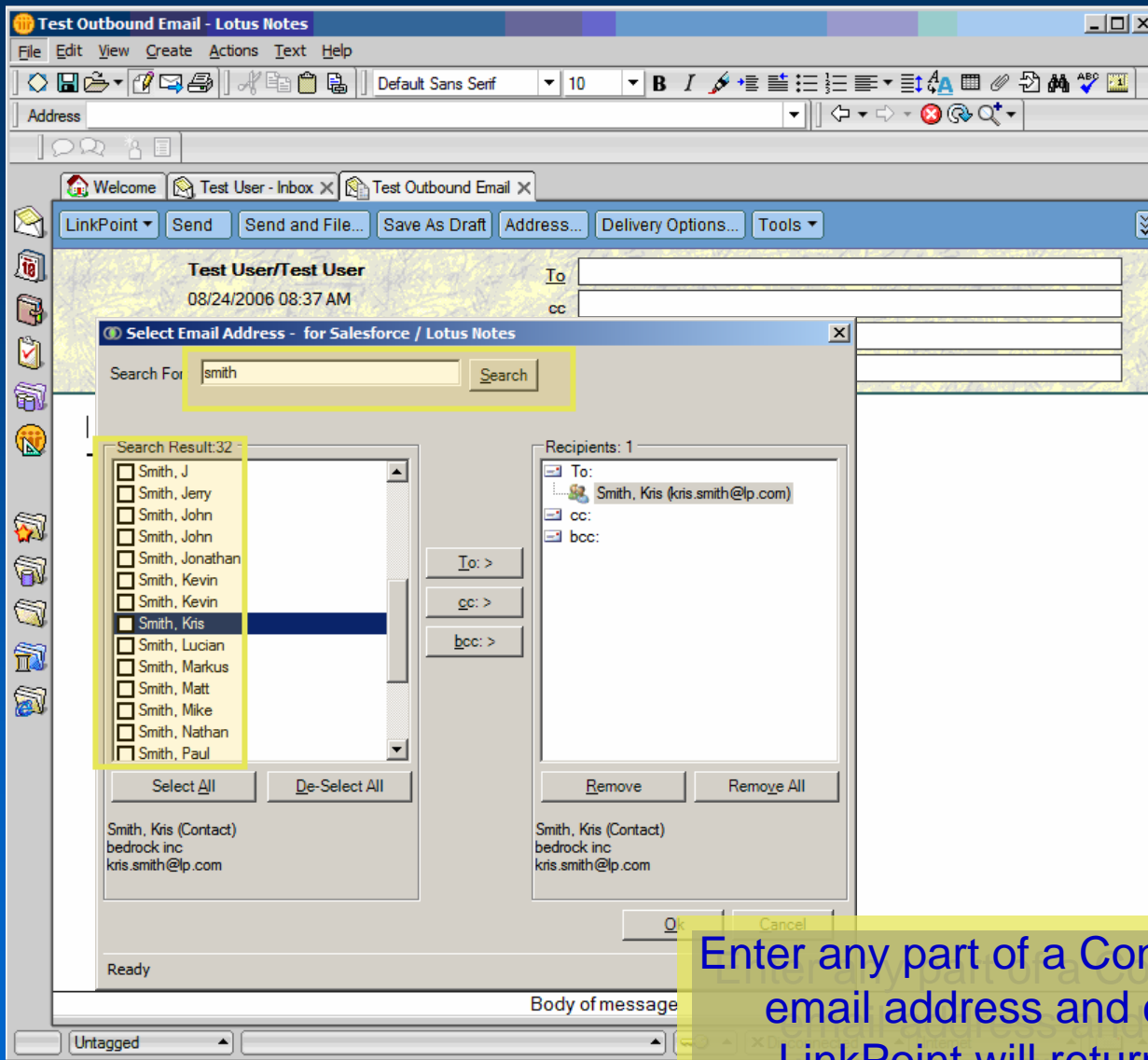
**How to record an Outbound email
from Lotus Notes to salesforce.com.**



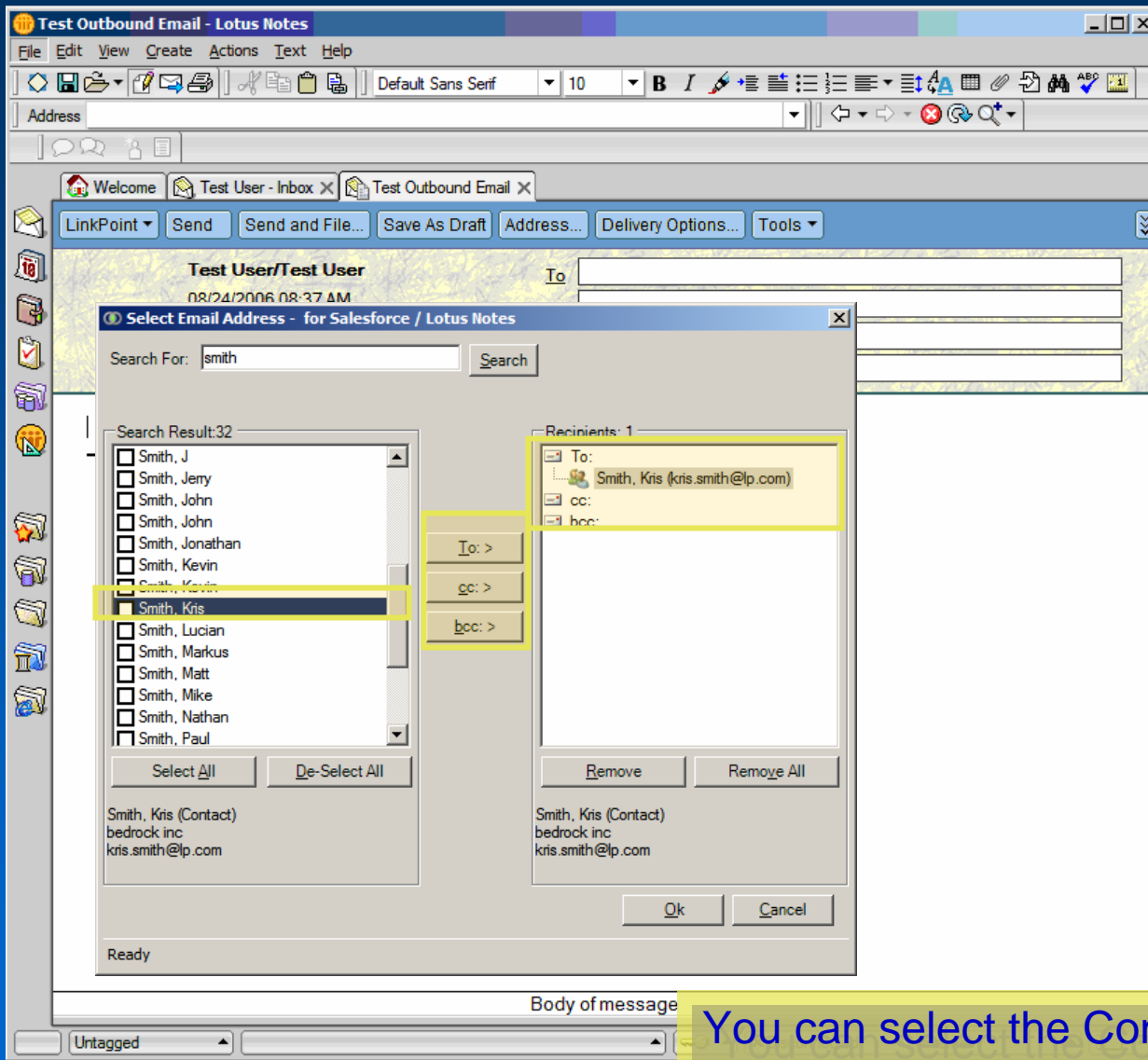
Start a New Memo



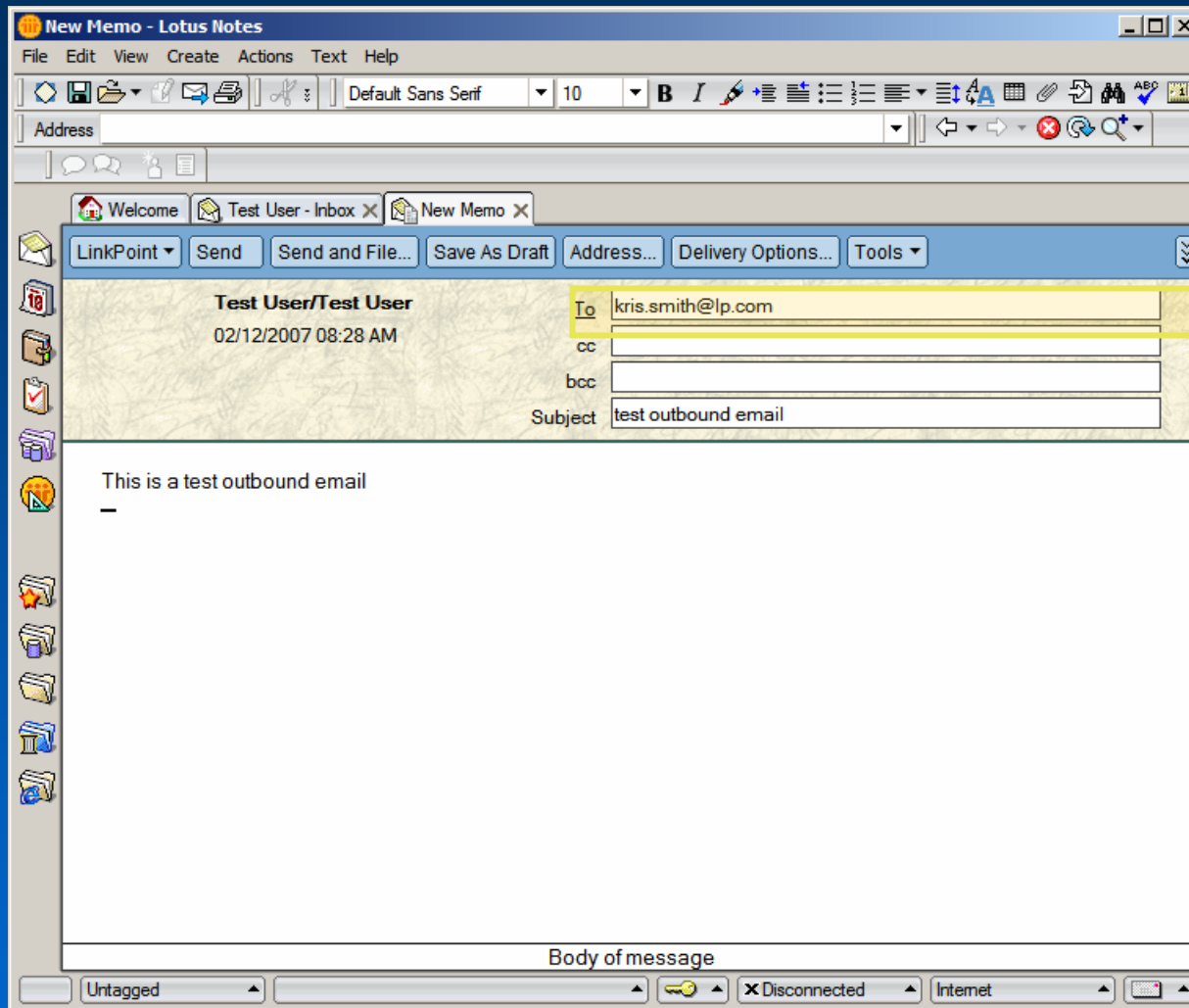
You can address the email by typing an email address, selecting a recipient from your Lotus Notes address book, or by using the LinkPoint salesforce.com Address book.



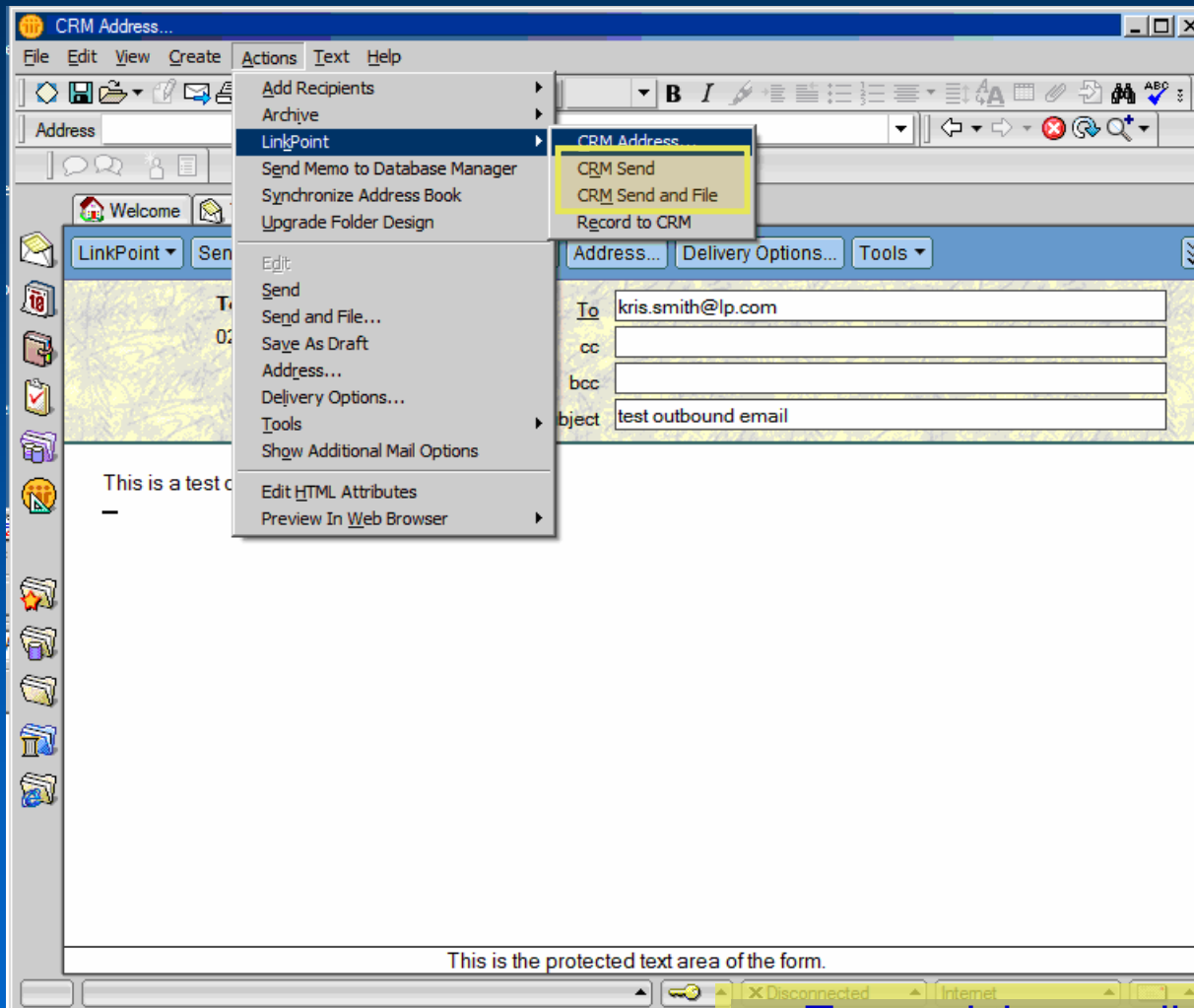
Enter any part of a Contact last name or email address and click "Search". LinkPoint will return all Contacts containing the search criteria.



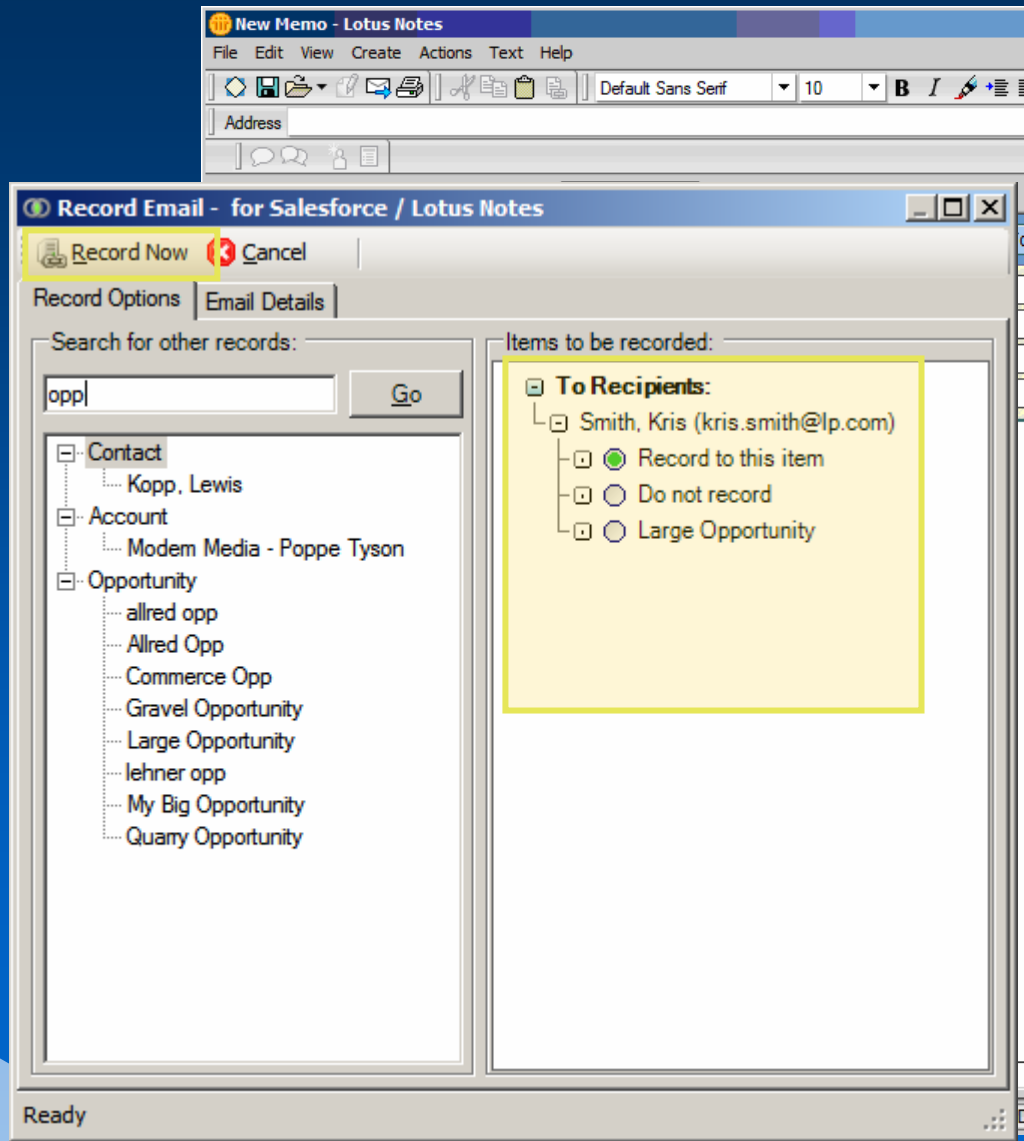
You can select the Contact or Lead and click the “To”, “CC”, or “BCC” to move the Contact or Lead to the recipient list.



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



To send the email and record it to salesforce.com, 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 salesforce.com.

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 salesforce.com 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 salesforce.com or "Cancel" to return to Lotus Notes.

Browser window: Contact: Kris Smith ~ Salesforce - Enterprise Edition - Microsoft Internet Explorer

Address: https://na1.salesforce.com/003300000NDwEI

Search: [Global] [Go!] [Advanced Search...]

Recent Items:

- Kris Smith
- Large Opportunity
- Wilma Flintstone
- Dustin Lehman
- Glenn Lehner
- Bedrock Construction
- Fred Flintstone
- Quarry Opportunity
- Gravel Opportunity

Recycle Bin

Contact Details:

Name	Kris Smith	Home Phone	
Account	bedrock inc	Mobile	
Title	CCARE Team Leader	Other Phone	
Department		Fax	
Birthdate		Email	kris.smith@lp.com
Reports To	[View Org Chart]	Alternate Email	
Lead Source		Assistant	
Contact Division	Global	Asst. Phone	
Inactive	<input type="checkbox"/>	Contact Record Type	
Contact Type	BusinessContact	Other Address	
Mailing Address	USA		
Created By	Glenn Lehner, 12/28/2006 3:23 PM	Last Modified By	Glenn Lehner, 2/12/2007 10:36 AM
Description			
Custom Links	EXE		

Buttons: Edit, Delete, Clone, Request Update, Enable Self-Service

Opportunities:

Action	Opportunity Name	Stage	Amount	Close Date
Edit Del	Large Opportunity	Needs Analysis		2/22/2007

Cases: No records to display

Open Activities:

Action	Subject	Related To	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Smith record added		✓	2/13/2007	Not Started	Normal	Nart Dokhoan

Activity History:

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	test outbound email		✓	2/12/2007	Glenn Lehner	2/12/2007 10:40 AM

The email has been recorded in the salesforce.com History section.

Task: test outbound email ~ Salesforce - Enterprise Edition - Microsoft Internet Explorer

Address: https://na1.salesforce.com/00T3000000V6QRc?retURL=%2F003300000NDwE1

Setup Help & Training Logout Appexchange Sales

Home Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Cases Solutions Products Reports Documents Dashboards LPUsers

Brought to you by GENWATT

Divisions: Global

Search: [Search] [Go] [Advanced Search...]

Create New... [Dropdown]

Recent Items:

- Kris Smith
- Large Opportunity
- Wilma Flintstone
- Dustin Lehman
- Glenn Lehner
- Bedrock Construction
- Fred Flintstone
- Quarry Opportunity
- Gravel Opportunity

Recycle Bin

Task
test outbound email [Help for this Page](#)

Edit Delete Create Follow Up Task Create Follow Up Event

Task Detail

Assigned To	Glenn Lehner	Status	Completed
Subject	test outbound email	Name	Kris Smith
Due Date	2/12/2007	Related To	
Phone	(818) 610-1591 x150	Email	kris.smith@lp.com
Priority	Normal	Type	Email
Created By	Glenn Lehner , 2/12/2007 10:40 AM	Last Modified By	Glenn Lehner , 2/12/2007 10:40 AM
Comments	<p>From: glehner@rdanet.com To: kris.smith@lp.com cc: bcc:</p> <p>Date: 2/12/2007 7:40:00 AM</p> <p>Subject: test outbound email</p> <p>This is a test outbound email</p>		

Reminder

Reminder

Edit Delete Create Follow Up Task Create Follow Up Event

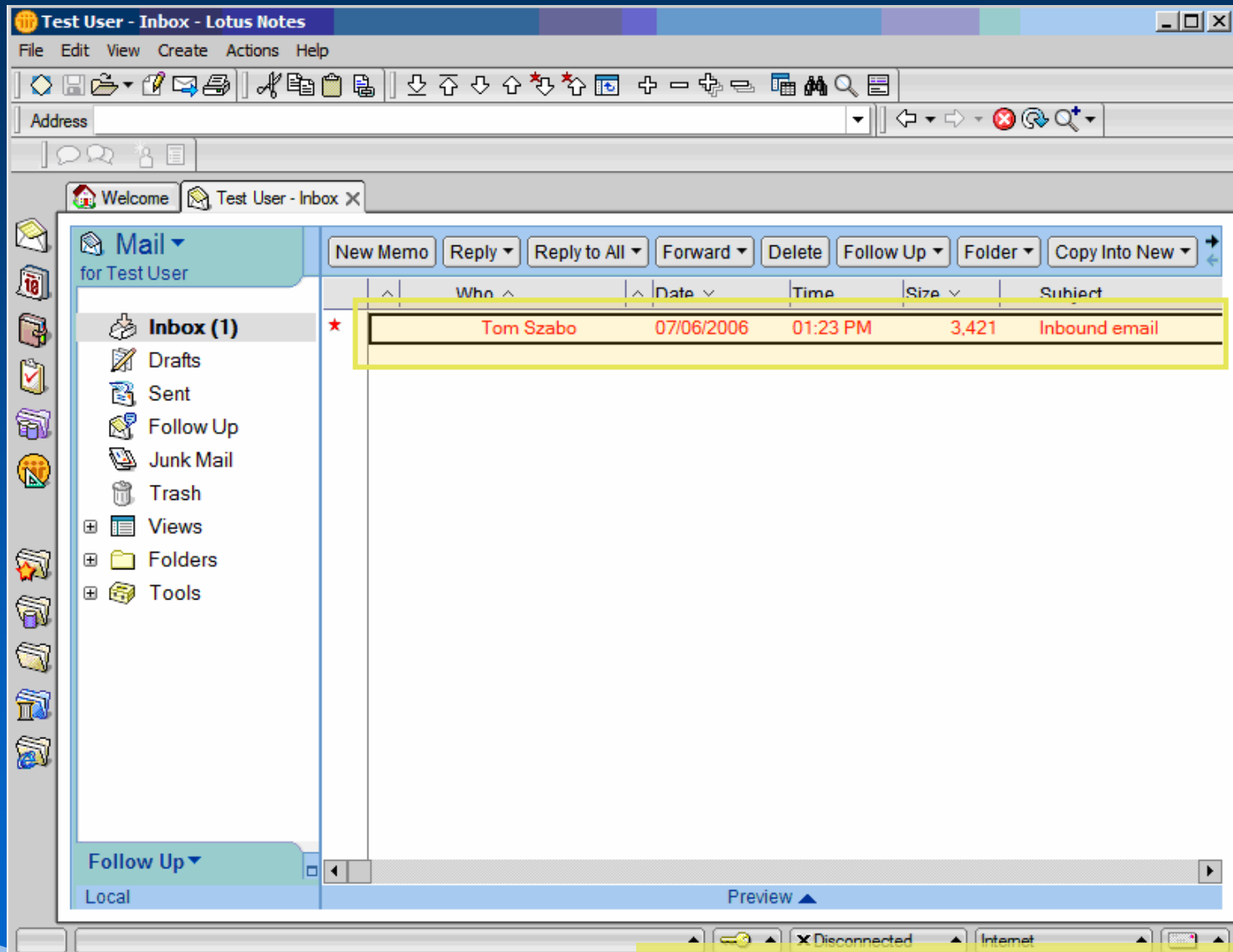
Home | Campaigns | Leads | Accounts | Contacts | Opportunities | Forecasts | Contracts | Cases | Solutions | Products | Reports | Documents | Dashboards | LPUsers | All Tabs

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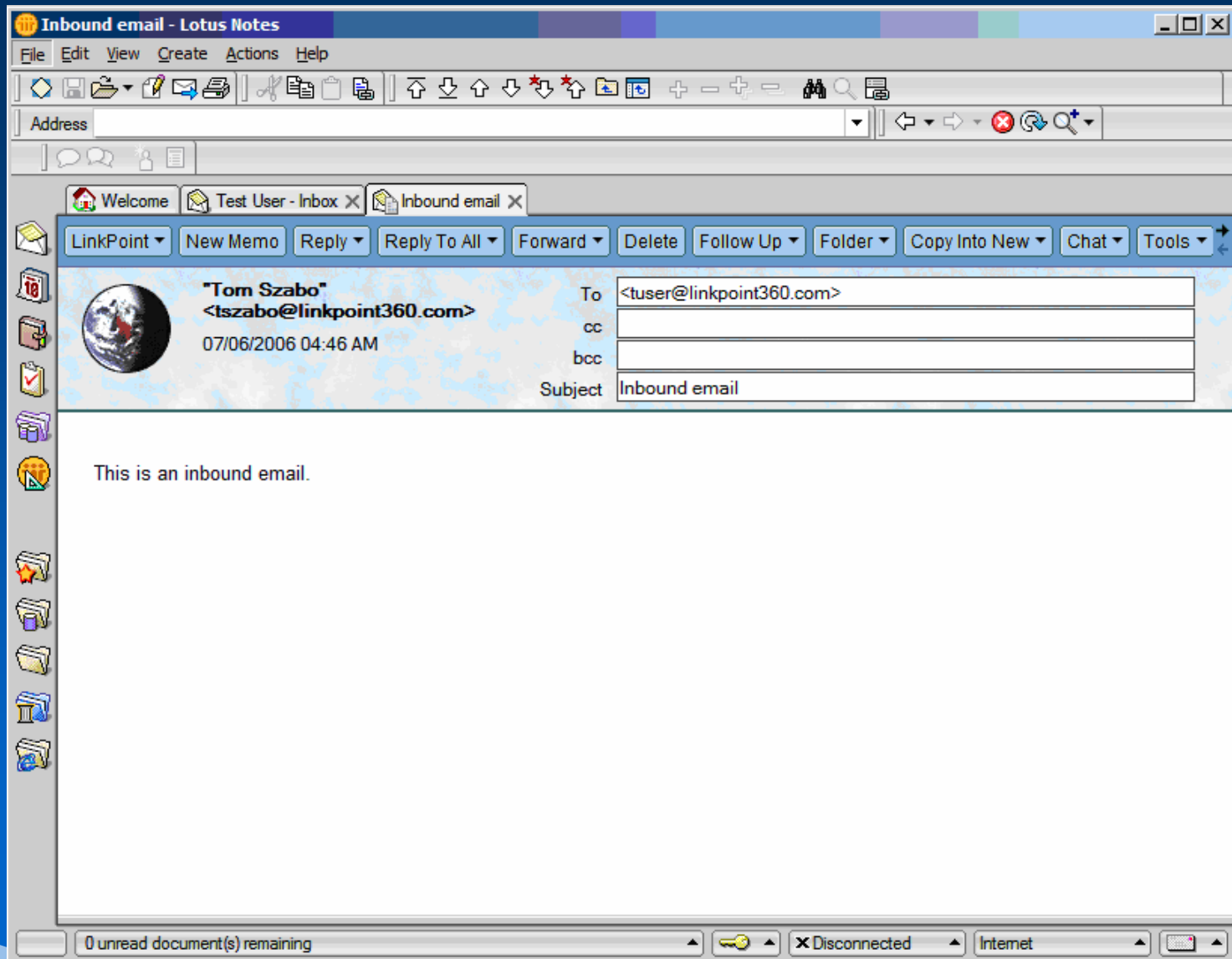
If you "Click" on the email, salesforce.com will display the details of the message and a listing of all attachments that were included on the email.

Step 3

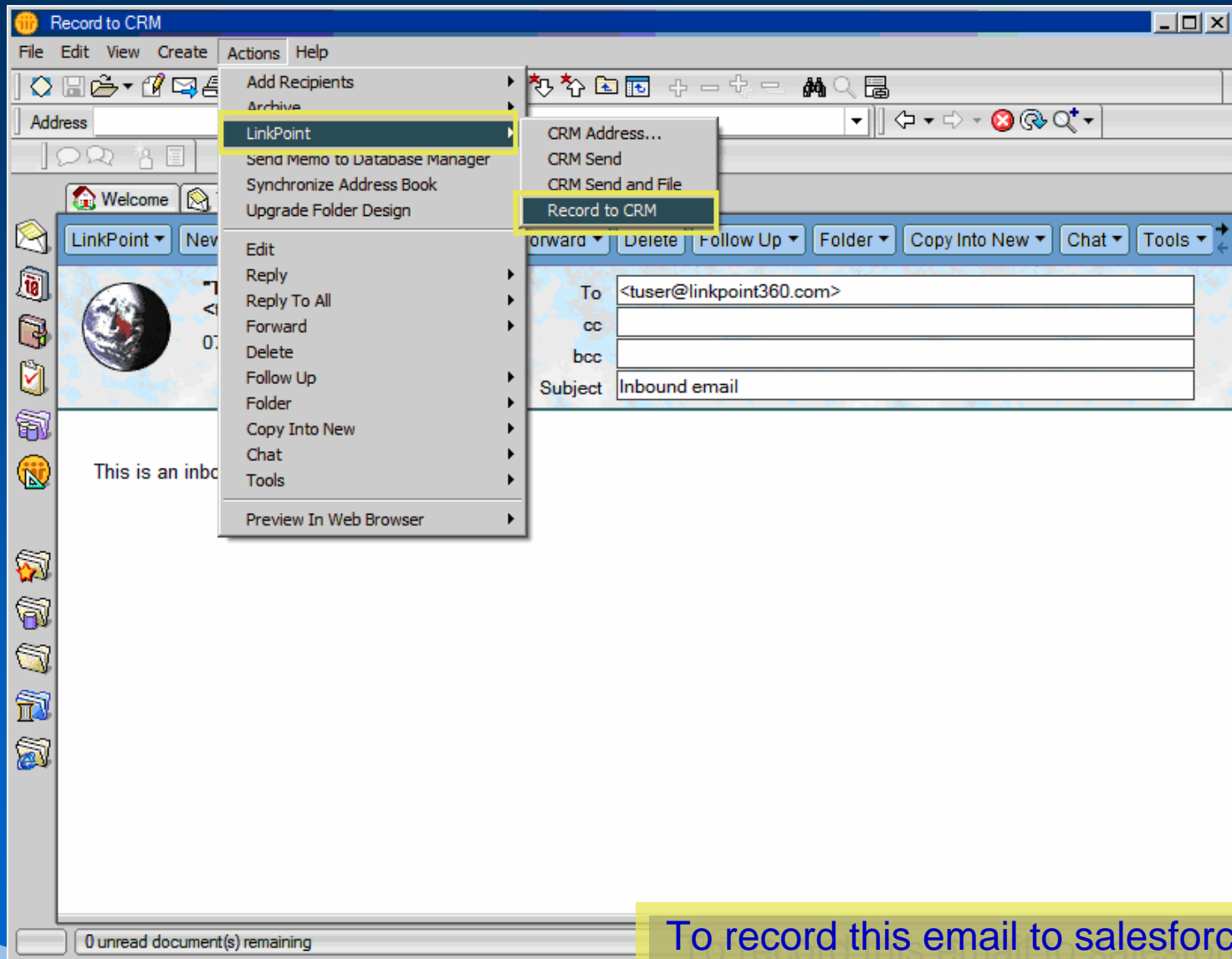
**How to record an Inbound email
from Lotus Notes to salesforce.com.**



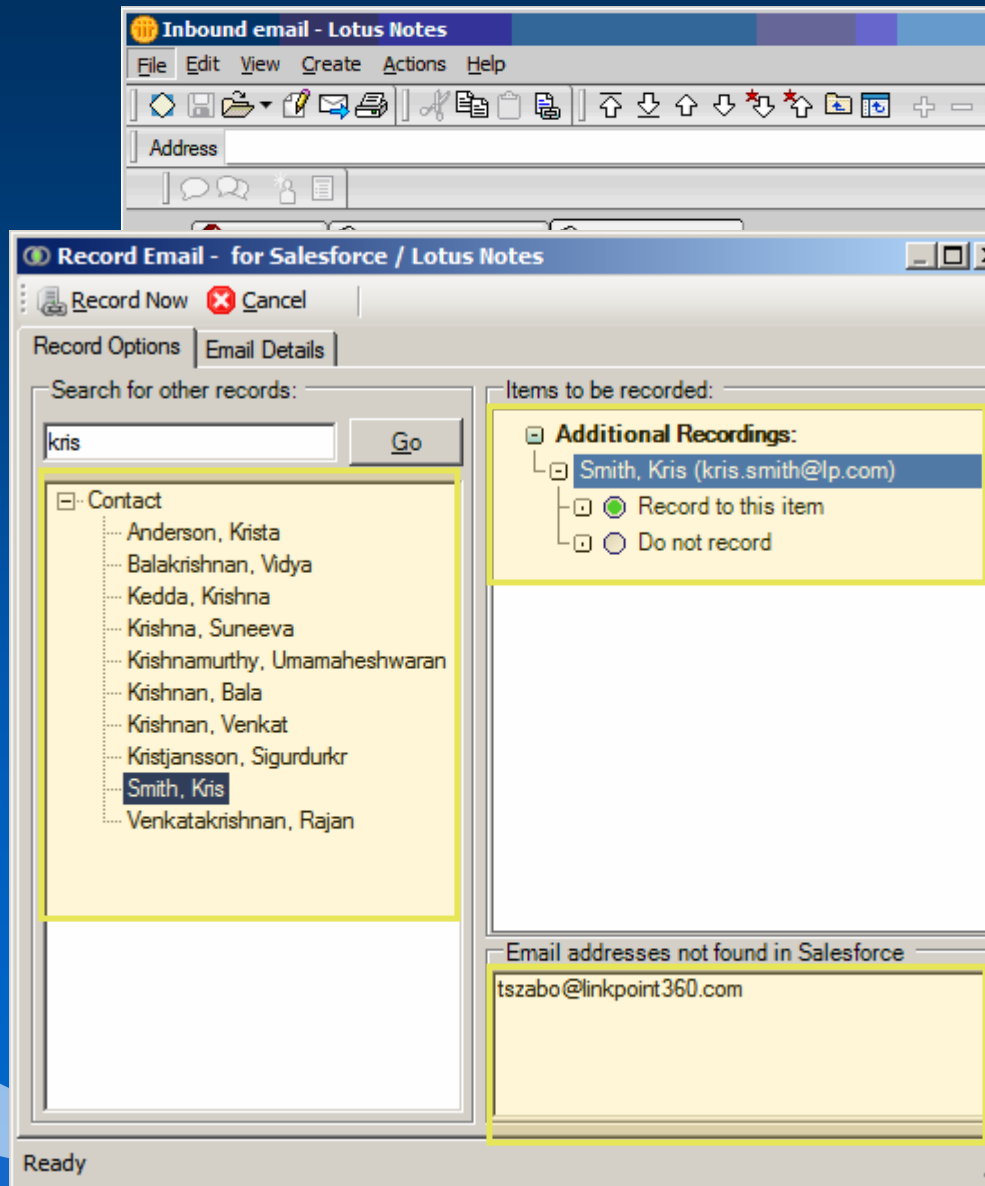
Select the email in Lotus Notes that you would like to record to salesforce.com.



Open the email in Lotus Notes.



To record this email to salesforce.com, click “Actions”, LinkPoint”, and Record to CRM”



The LinkPoint email window is used to identify how to record the email to salesforce.com.

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 salesforce.com” section.

You can then either add that Contact to salesforce.com 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 salesforce.com or “Cancel” to return to Lotus Notes.

Contact: Kris Smith ~ Salesforce - Enterprise Edition - Microsoft Internet Explorer

Address: https://na1.salesforce.com/003300000NDwEI

Custom Links: EXE

Opportunities

Action	Opportunity Name	Stage	Amount	Close Date
Edit Del	Large Opportunity	Needs Analysis		2/22/2007

Cases

No records to display

Open Activities

Action	Subject	Related To	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Smith record added		✓	2/13/2007	Not Started	Normal	Nat Dokhuan

Activity History

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Re: Fwd: Another GroupWise Email Account		✓	2/12/2007	Glenn Lehner	2/12/2007 11:05 AM
Edit Del	test outbound email		✓	2/12/2007	Glenn Lehner	2/12/2007 10:40 AM

Campaign History

No records to display

Notes & Attachments

No records to display

Home | Campaigns | Leads | Accounts | Contacts | Opportunities | Forecasts | Contracts | Cases | Solutions | Products | Reports | Documents | Dashboards | LPUsers | All Tabs

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The email has been recorded in the salesforce.com History 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

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