

# *LinkPoint for salesforce.com*

Email Tutorial

Novell GroupWise Edition



Novell® GroupWise®

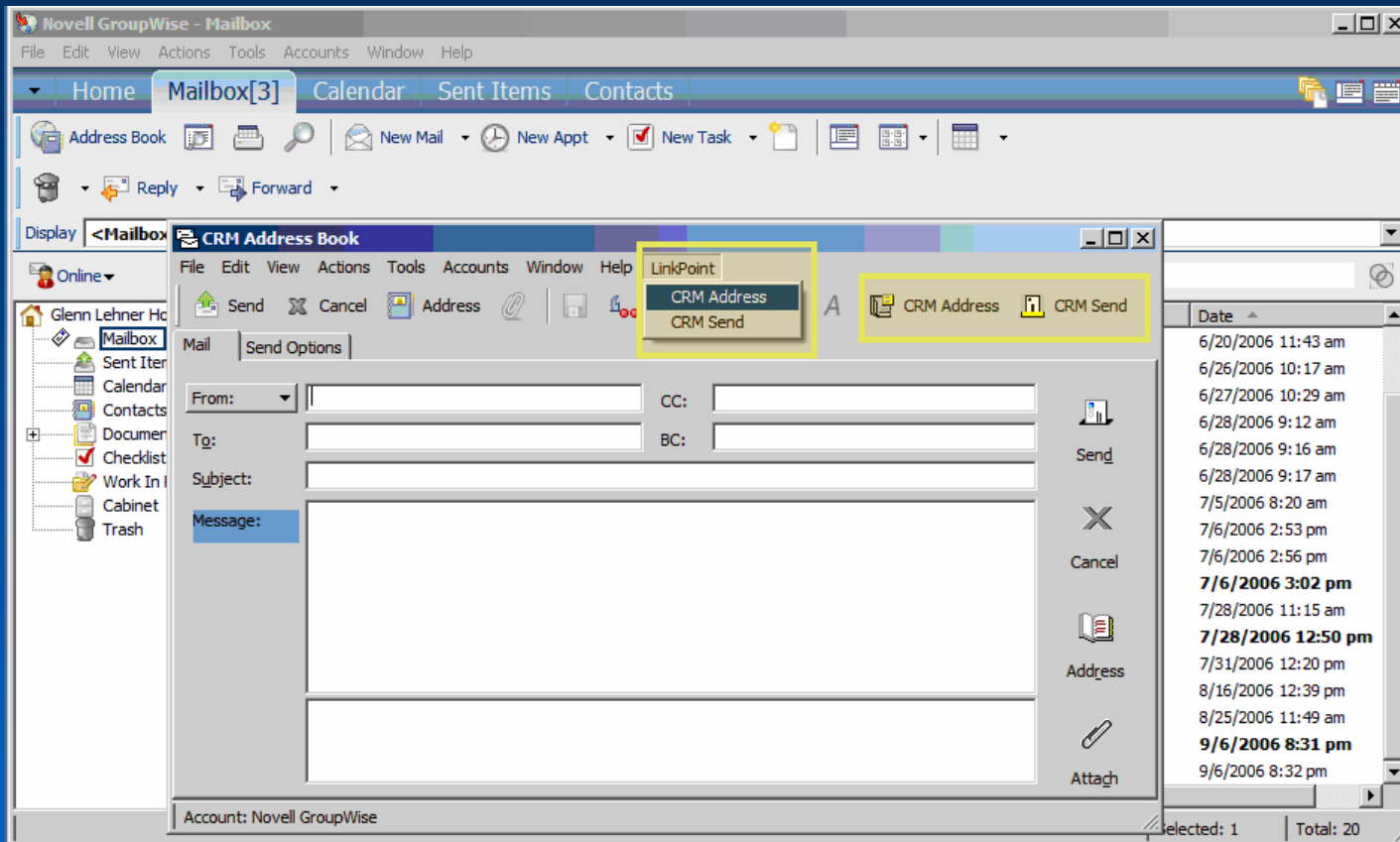


# ***Email Tutorial Overview...***

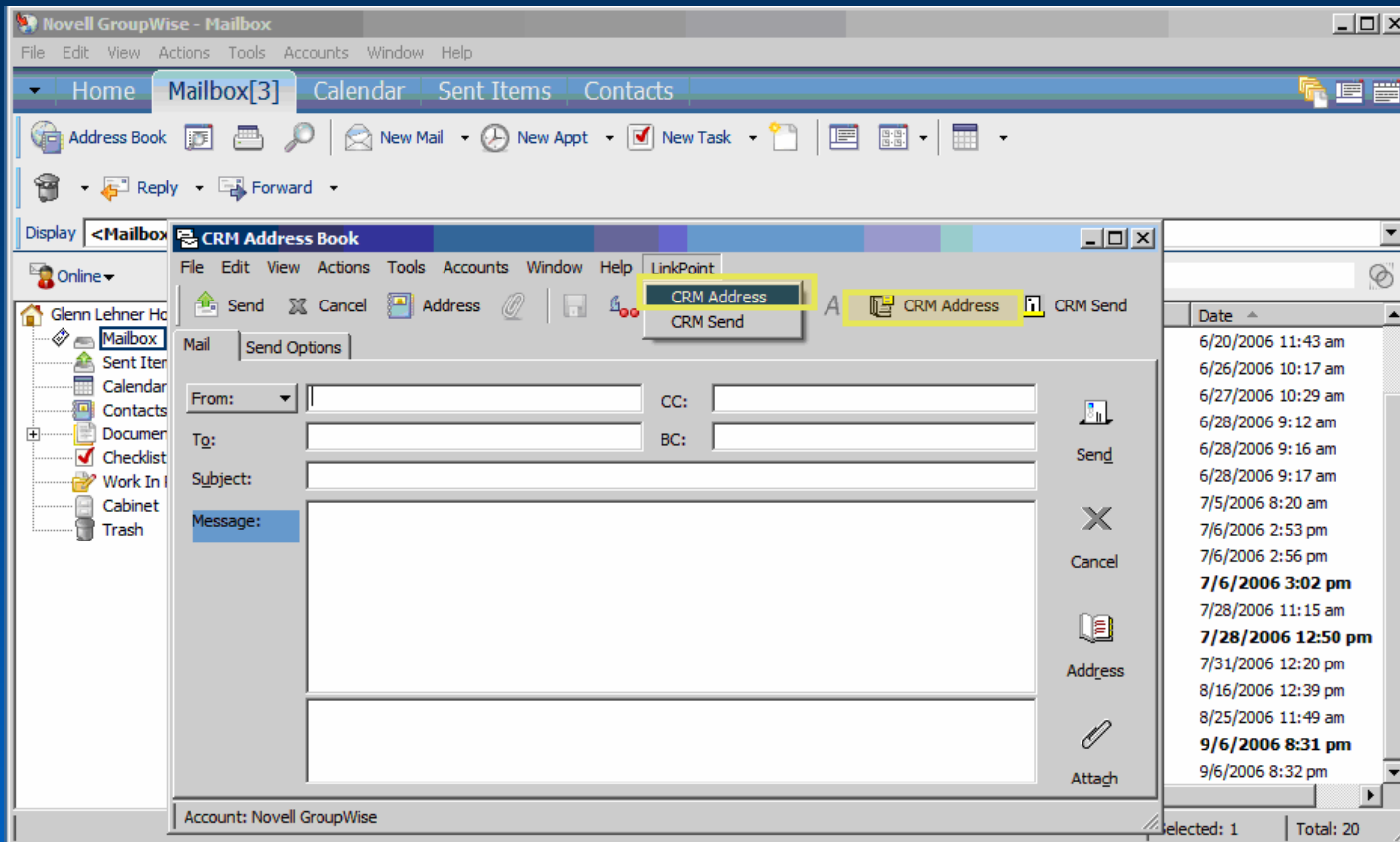
- 1. How to access LinkPoint from Novell GroupWise.**
- 2. How to record an outbound email from Novell GroupWise to salesforce.com.**
- 3. How to record an inbound email from Novell GroupWise to salesforce.com.**

# *Step 1*

**How to access LinkPoint  
from Novell GroupWise.**

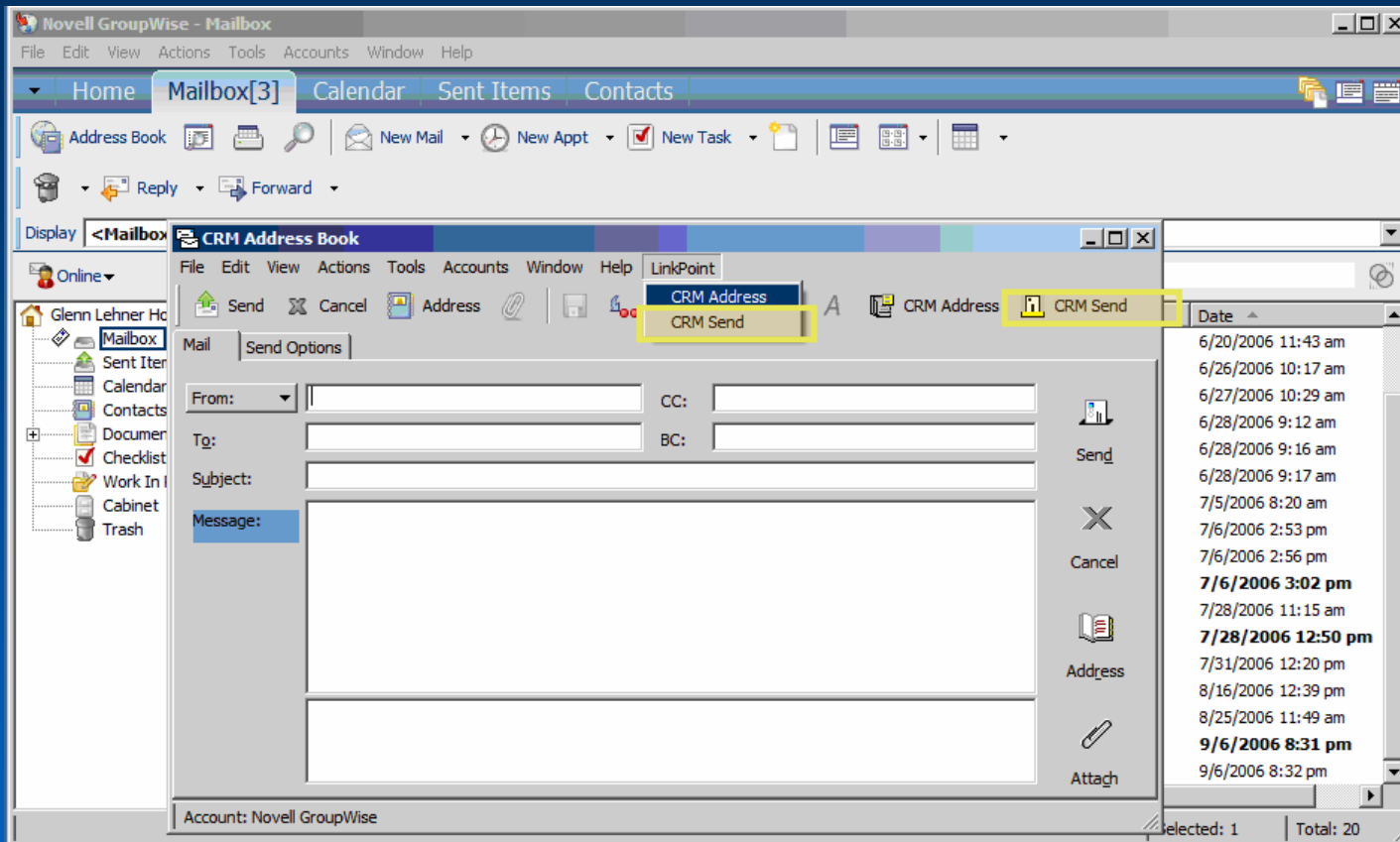


There are 2 LinkPoint menu's or toolbar buttons available from within Novell GroupWise.



## CRM Address...

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



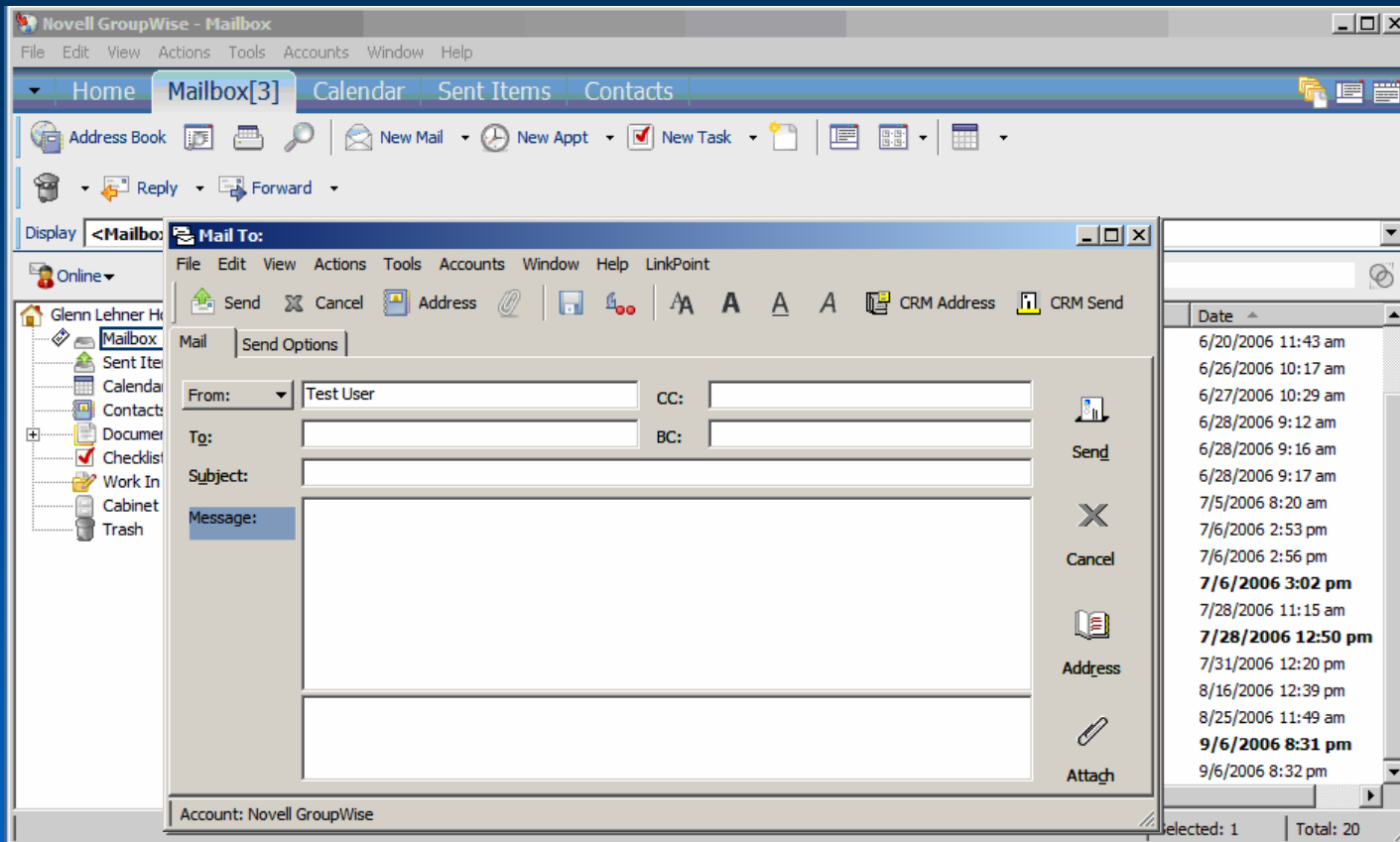
## CRM Send

This will send your email via Novell GroupWise and record it to salesforce.com.

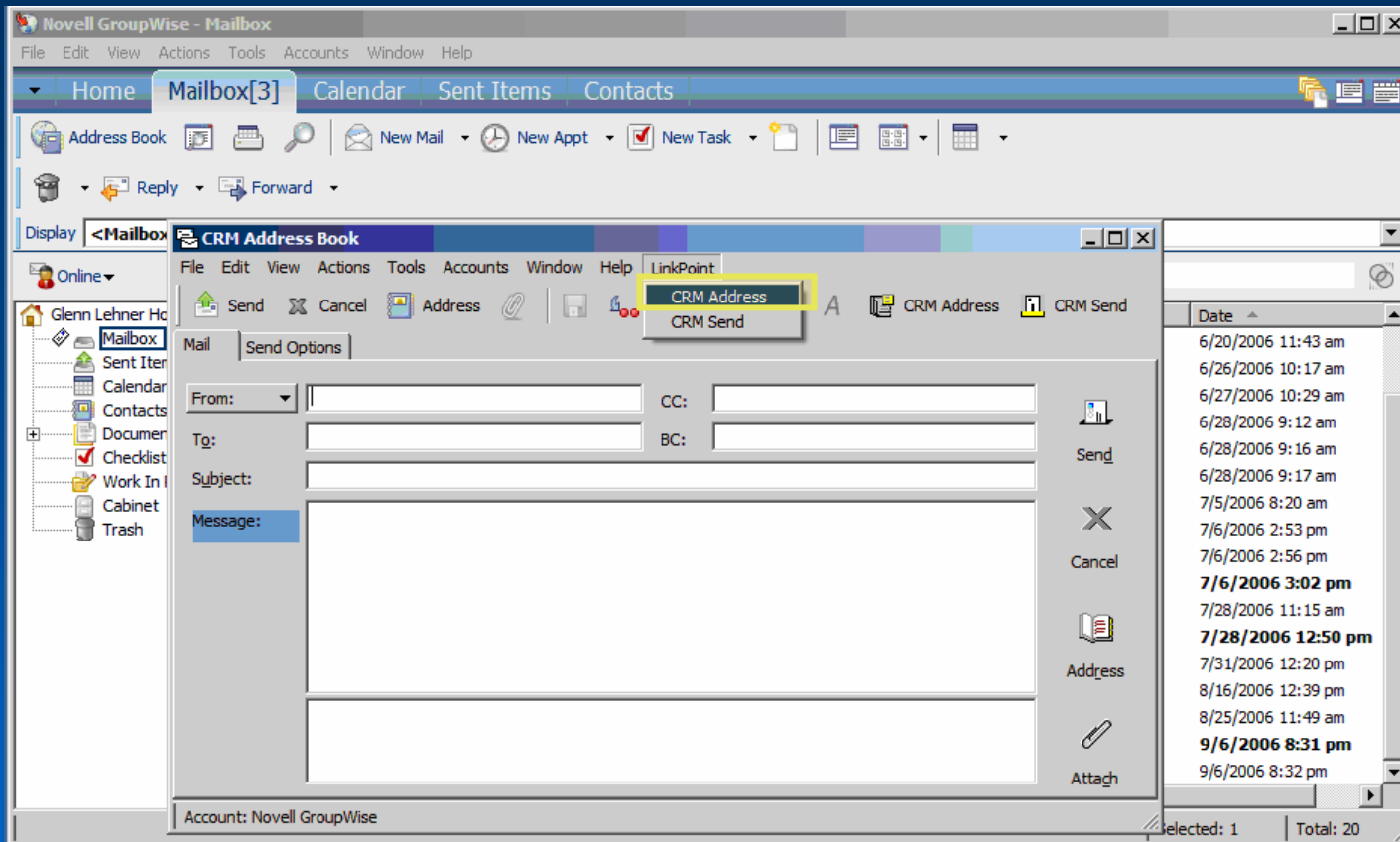


# *Step 2*

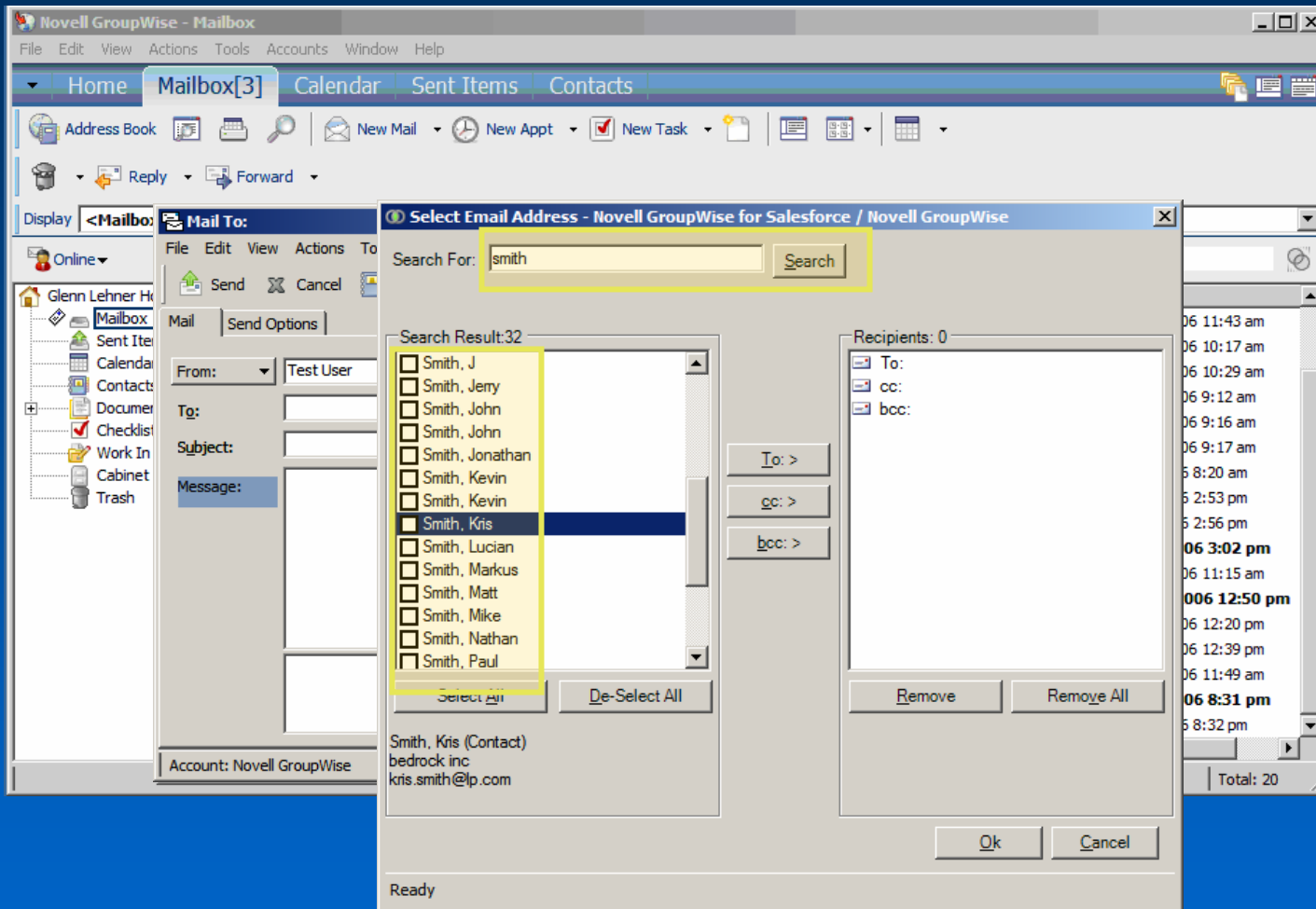
**How to record an Outbound email  
from Novell GroupWise to  
salesforce.com.**



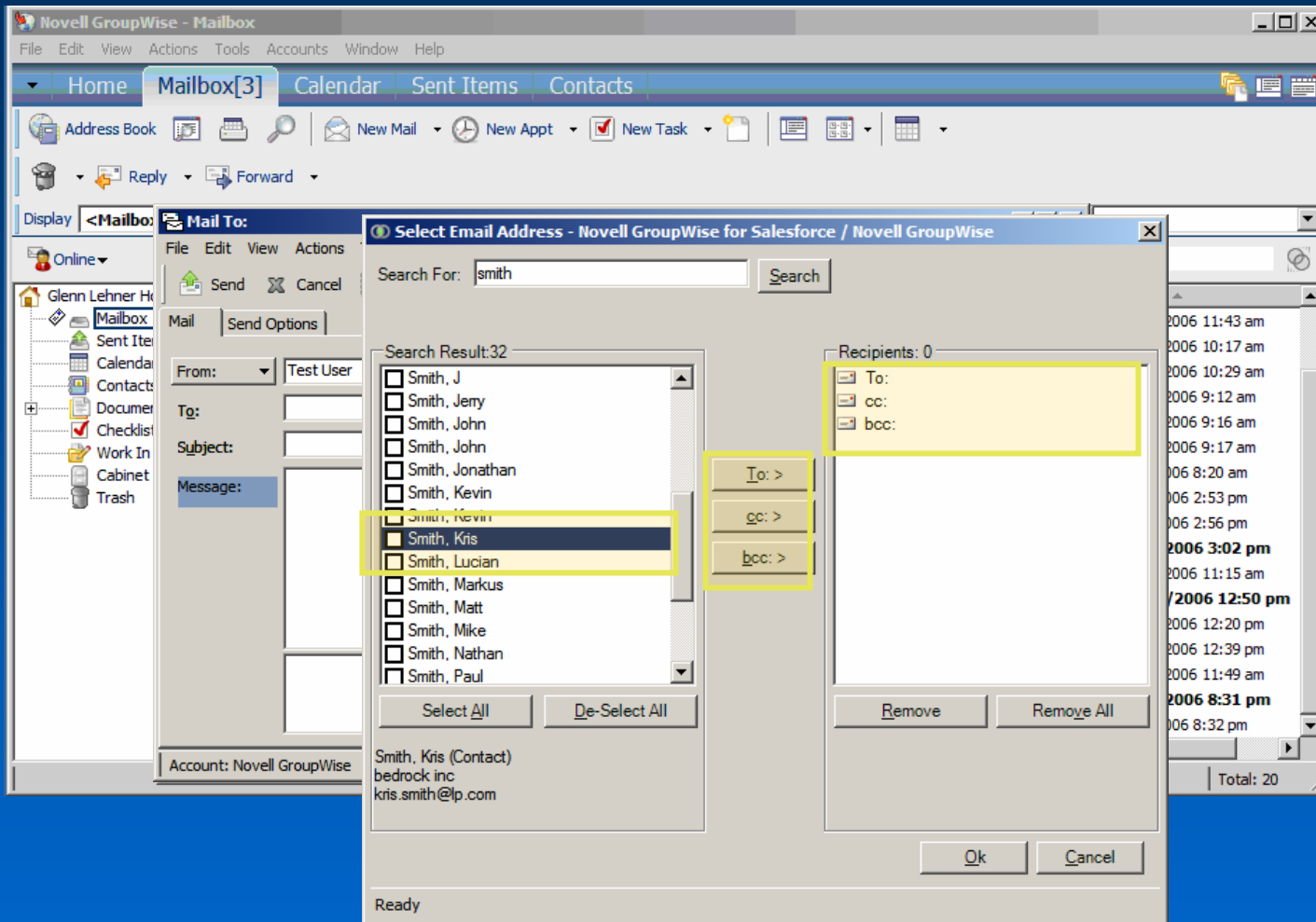
Start a New Memo



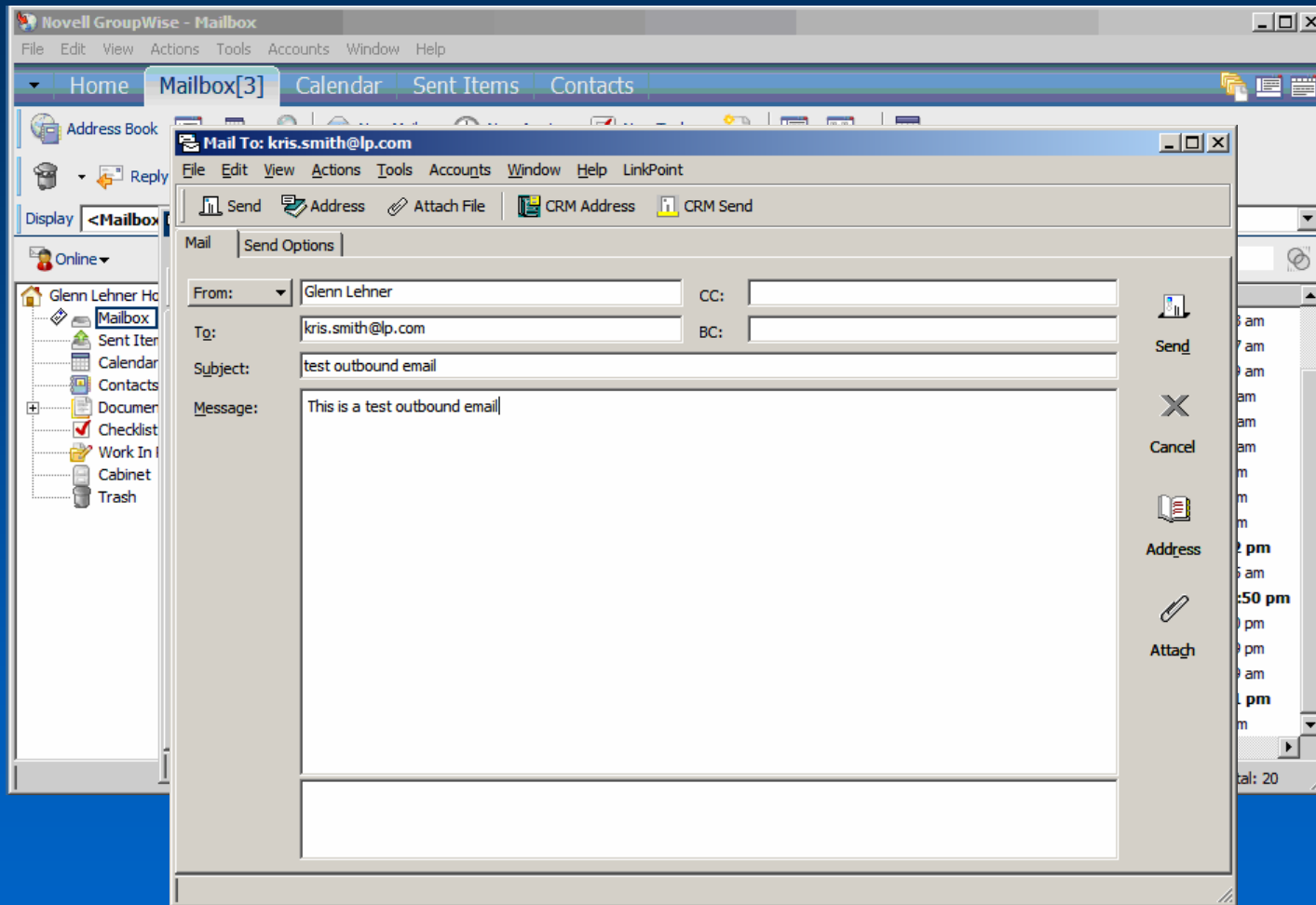
You can address the email by typing an email address, selecting a recipient from your Novell GroupWise address book, or by using the LinkPoint salesforce.com Address book.



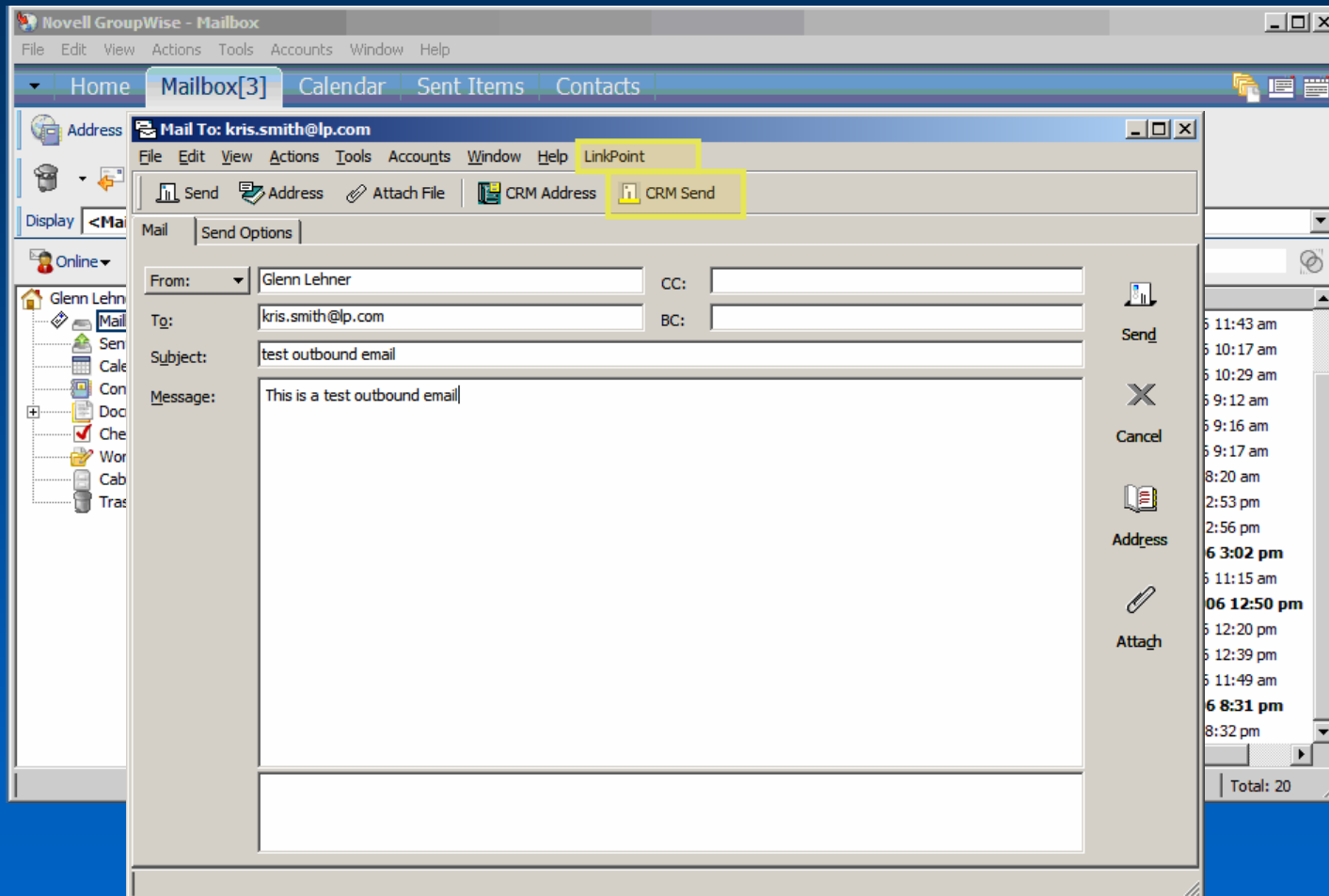
Enter any part of a Contact last name or email address and click "Search". LinkPoint will return all Contacts and Leads containing the search criteria.



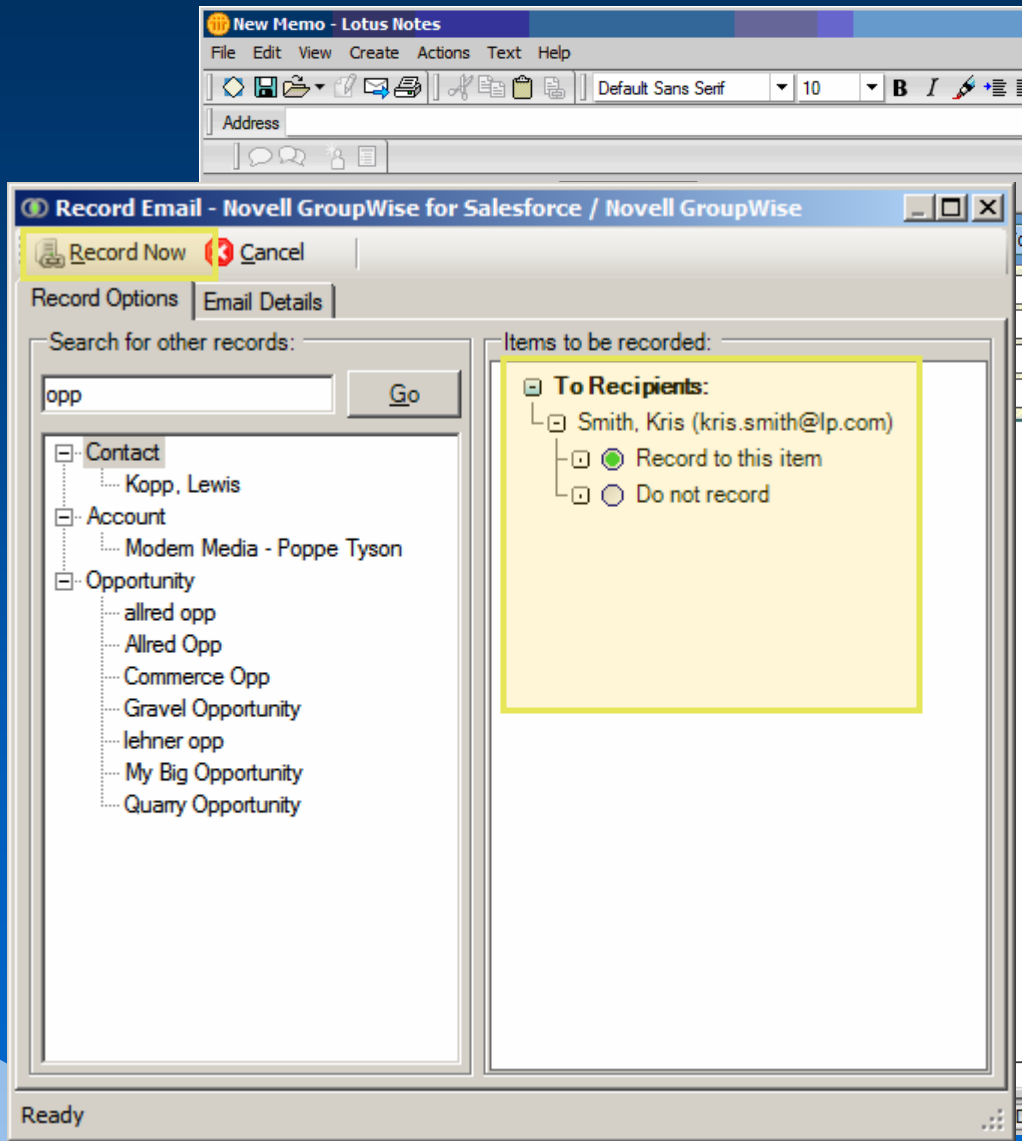
You can select the Contact or Lead and click the "To", "CC", or "BCC" to move the Contact or Lead to the recipient list.



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 "LinkPoint", then click the "CRM Send" menu or toolbar 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 GroupWise and record the email to salesforce.com or "Cancel" to return to GroupWise.

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

Address: https://na1.salesforce.com/0033000000NDwEI

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

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**Contact Information:**

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		

[Edit] [Delete] [Clone] [Request Update] [Enable Self-Service]

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**Opportunities** [New] [Opportunities Help ?]

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

---

**Cases** [New] [Cases Help ?]

No records to display

---

**Open Activities** [New Task] [New Event] [Open Activities Help ?]

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** [Log A Call] [Mail Merge] [Send An Email] [Request Update] [View All] [Activity History Help ?]

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/00T300000V6QRc?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

Task Detail [Edit] [Delete] [Create Follow Up Task] [Create Follow Up Event]

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]

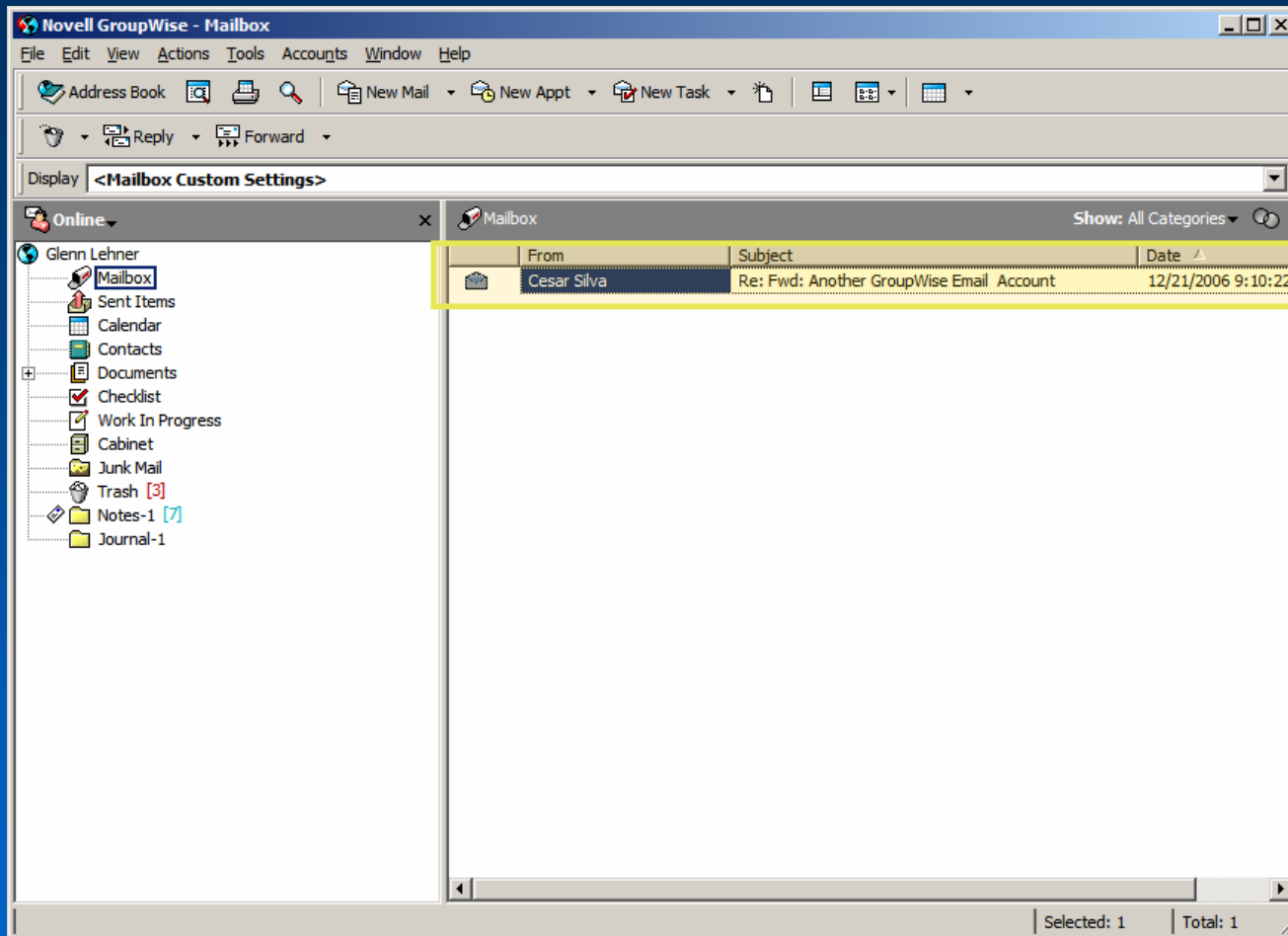
Home | Campaigns | Leads | Accounts | Contacts | Opportunities | Forecasts | Contracts | Cases | Solutions | Products | Reports | Documents | Dashboards | LPUsers | All Tabs

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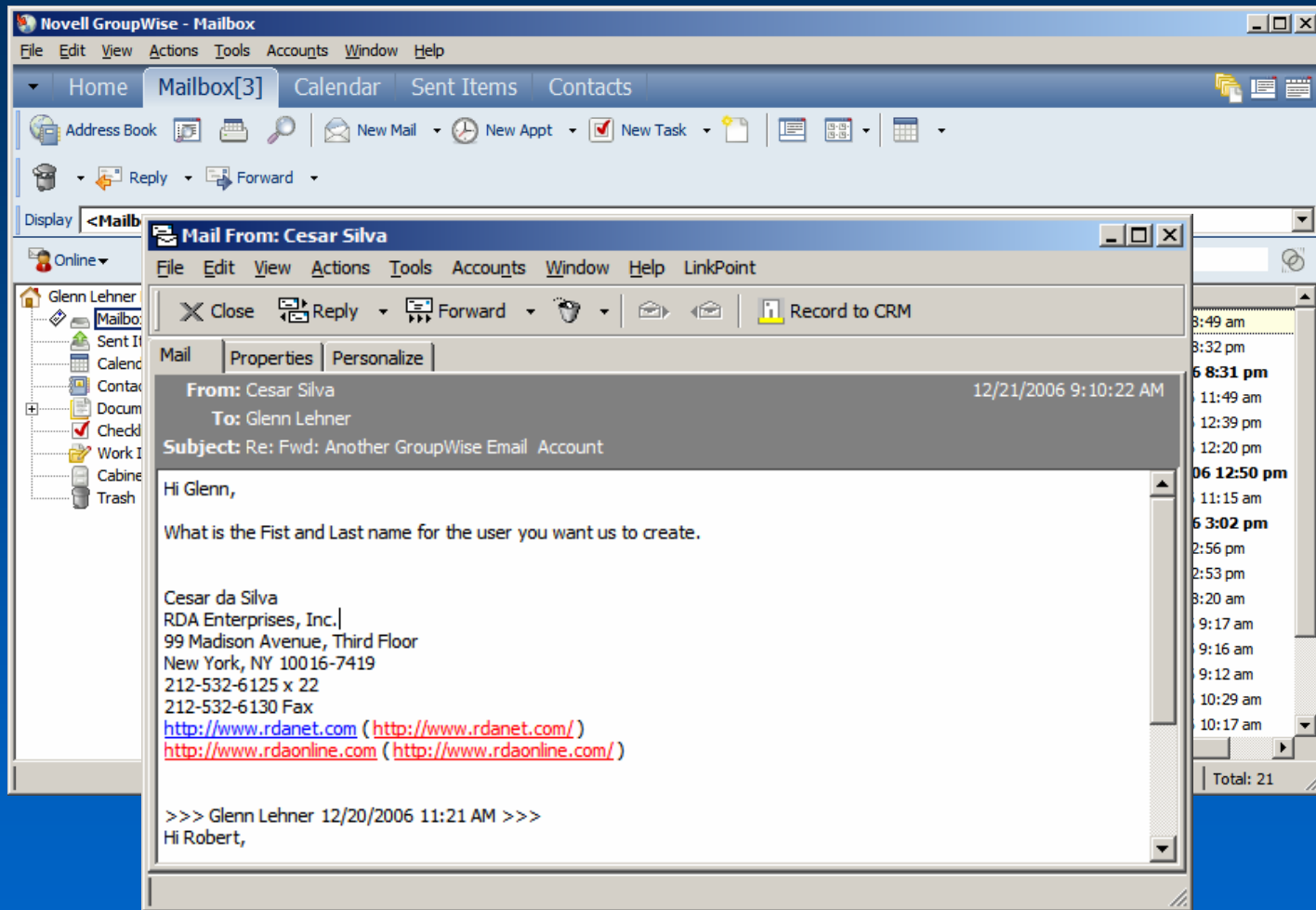
If you "Click" on the email, salesforce.com will display the details of the message and a listing of all attachments that were included on the email.

# *Step 3*

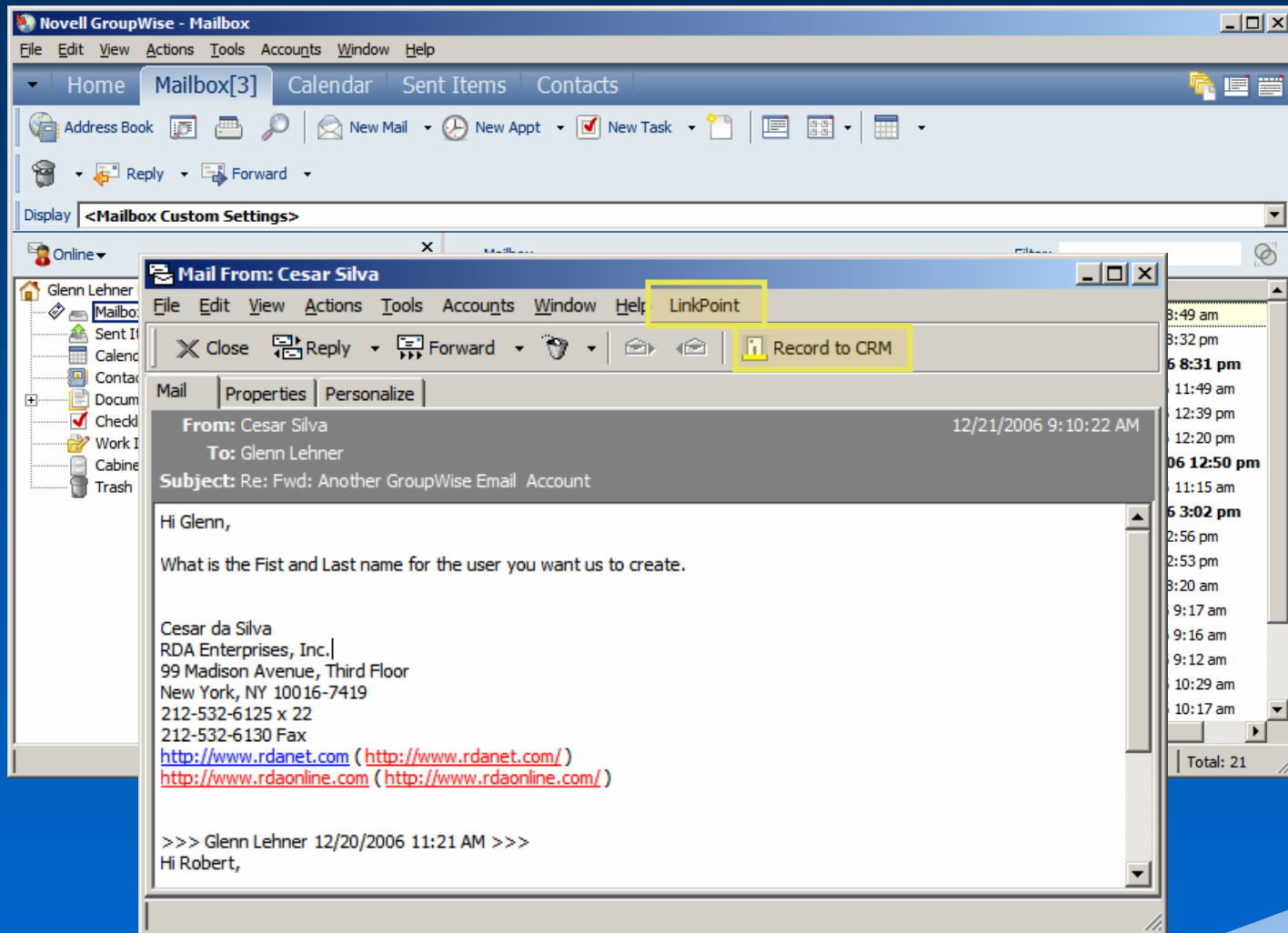
**How to record an Inbound email  
from Novell GroupWise to  
salesforce.com.**



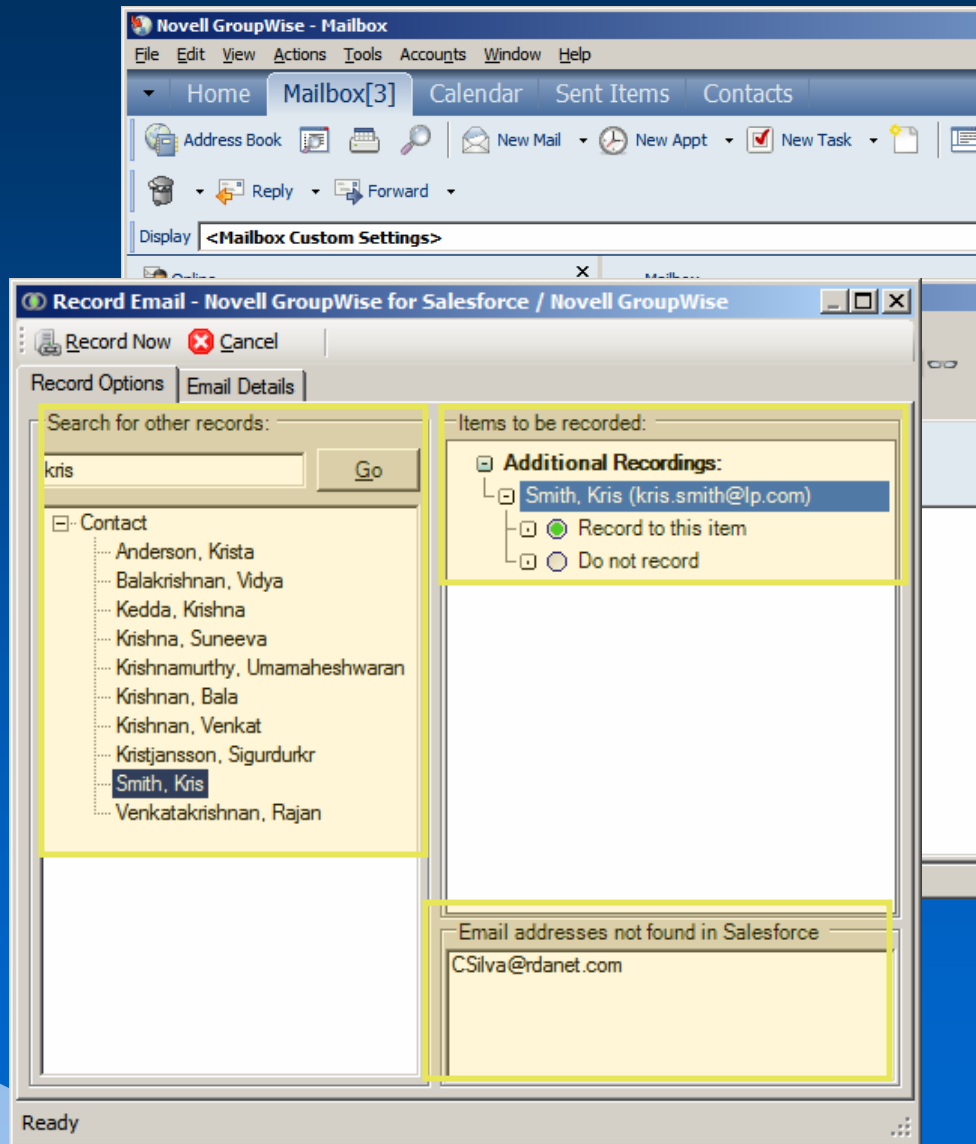
Select the email in Novell GroupWise that you would like to record to salesforce.com.



Open the email in Novell GroupWise.



To record this email to salesforce.com, click "LinkPoint", and "Record to CRM" or the "Record to CRM" toolbar button.



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, Opportunity or Case to record it to.

Click “Record Now” to record the email to salesforce.com or “Cancel” to return to Novell GroupWise.

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

Address: https://na1.salesforce.com/0033000000NDwEI

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

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**Name:** Kris Smith

**Account:** [bedrock inc](#)

**Title:** CCARE Team Leader

**Department:**

**Birthdate:**

**Reports To:** [\[View Org Chart\]](#)

**Lead Source:**

**Contact Division:** Global

**Inactive:**

**Contact Type:** BusinessContact

**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

[Edit](#) [Delete](#) [Clone](#) [Request Update](#) [Enable Self-Service](#)

---

**Opportunities** [New](#) [Opportunities Help](#) ?

Action	Opportunity Name	Stage	Amount	Close Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Large Opportunity</a>	Needs Analysis		2/22/2007

---

**Cases** [New](#) [Cases Help](#) ?

No records to display

---

**Open Activities** [New Task](#) [New Event](#) [Open Activities Help](#) ?

Action	Subject	Related To	Task	Due Date	Status	Priority	Assigned To
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">Smith record added</a>		✓	2/13/2007	Not Started	Normal	<a href="#">Nart Dokhoan</a>

---

**Activity History** [Log A Call](#) [Mail Merge](#) [Send An Email](#) [Request Update](#) [View All](#) [Activity History Help](#) ?

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">test outbound email</a>		✓	2/12/2007	<a href="#">Glenn Lehner</a>	2/12/2007 10:40 AM

The email has been recorded in the saelsforce.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](mailto:info@LinkPoint360.com)

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