

LinkPoint for salesforce.com

Lotus Notes Edition



With LinkPoint you can...

- **Access your salesforce.com Contacts and Leads as an address book in Lotus Notes.**
- **Record Inbound and Outbound e-mails from Lotus Notes into salesforce.com.**
- **Store e-mail attachments in salesforce.com.**
- **Attach e-mails to Accounts, Contacts, Leads, Opportunities, or Cases.**
- **Synchronized Calendar, Contact and Tasks between salesforce.com and Lotus Notes.**

Sample LinkPoint Client Base

ABN-AMRO

Gulfstream Aerospace

The Hartford

TransUnion

Discovery Communications

Panasonic

Deutsche Bank Securities

American Express

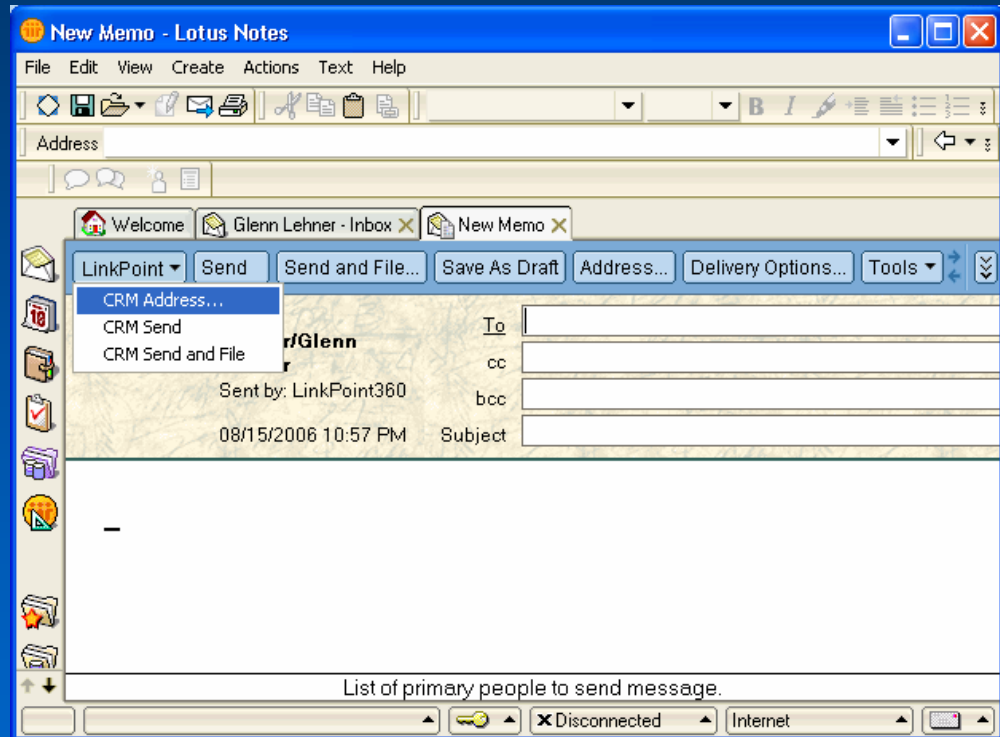
The New York Times Company

Deluxe Corporation

Armstrong World Industries

LinkPoint e-mail Overview

- You can utilize your salesforce.com contacts for addressing by selecting the “CRM Address” menu.
- You can send your e-mail via Lotus Notes and record it to salesforce.com by selecting “CRM Send” or “CRM Send and File” menu.



LinkPoint Addressing

- In the LinkPoint Address form you can search salesforce.com for Contacts and use them as recipients in your e-mails.

Select Email Address - for Salesforce / Lotus Notes

Search For:

Search Result:32

- Smith, J
- Smith, Jerry
- Smith, John
- Smith, John
- Smith, Jonathan
- Smith, Kevin
- Smith, Kevin
- Smith, Kris
- Smith, Lucian
- Smith, Markus
- Smith, Matt
- Smith, Mike
- Smith, Nathan
- Smith, Paul

Smith, Kris (Contact)
bedrock inc
kris.smith@lp.com

Recipients: 1

To:

cc:

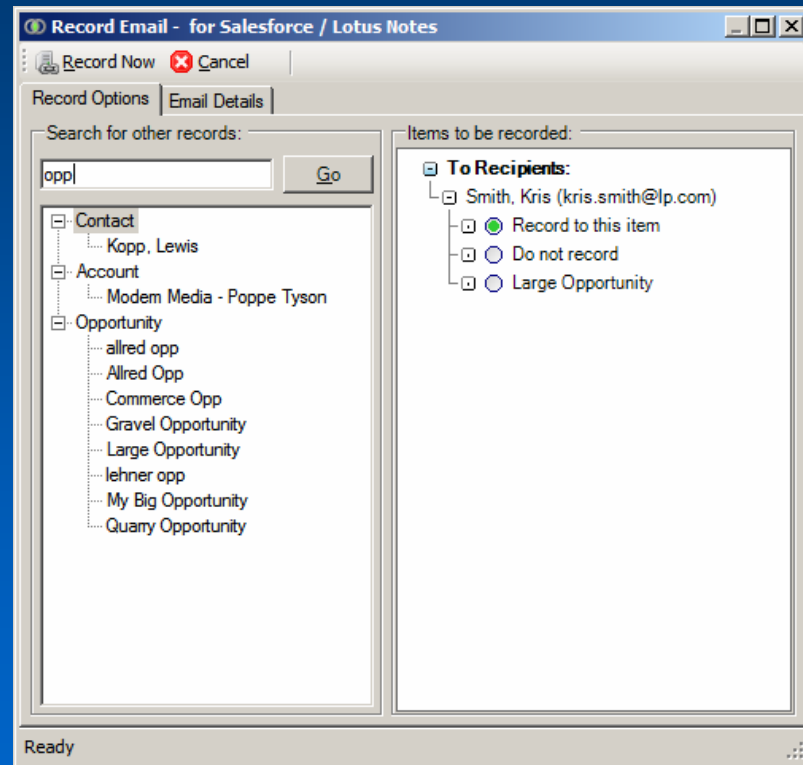
bcc:

Smith, Kris (Contact)
bedrock inc
kris.smith@lp.com

Ready

LinkPoint Record e-mail

- Once your e-mail is complete, you can send it via Lotus Notes and store it in salesforce.com.
- You can search and choose to record your e-mail on a business entity in salesforce.com. (Account, Contact, Opportunity, or Case)
- If there are attachments, you can select whether to store them in salesforce.com.



Email Recorded in salesforce.com

- Once the email has been sent and recorded to salesforce.com, the e-mail can be viewed in the “History” list.

The screenshot shows a web browser window displaying a Salesforce task record. The browser's address bar shows the URL: <https://na1.salesforce.com/00T3000000v6QRC?retURL=%2F003300000NDwE>. The page title is "Task: test outbound email ~ Salesforce - Enterprise Edition - Microsoft Internet Explorer".

The Salesforce interface includes a navigation bar with tabs for Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Cases, Solutions, Products, Reports, Documents, Dashboards, and LPUsers. A sidebar on the left contains a search bar, a "Create New..." dropdown, and a "Recent Items" list with entries like "Kris Smith", "Large Opportunity", "Wilma Flintstone", "Dustin Lehman", "Glenn Lehner", "Bedrock Construction", "Fred Flintstone", "Quarry Opportunity", and "Gravel Opportunity".

The main content area displays the task details for "test outbound email". The task is assigned to Glenn Lehner, has a due date of 2/12/2007, and a status of "Completed". The subject is "test outbound email". The phone number is (818) 610-1591 x150. The priority is "Normal". The task was created by Glenn Lehner on 2/12/2007 at 10:40 AM. The comments section contains the following text:

From: glehner@rdanet.com
To: kris.smith@lp.com
cc:
bcc:

Date: 2/12/2007 7:40:00 AM

Subject: test outbound email

This is a test outbound email

Below the comments is a "Reminder" section with a checkbox labeled "Reminder".

At the bottom of the page, there is a navigation bar with links for Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Cases, Solutions, Products, Reports, Documents, Dashboards, LPUsers, and All Tabs. The footer contains the copyright notice: "Copyright © 2000-2007 salesforce.com, inc. All rights reserved." and links for Privacy Statement, Security Statement, Terms of Use, and Accessibility.

LinkPoint Synchronization Capabilities...

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

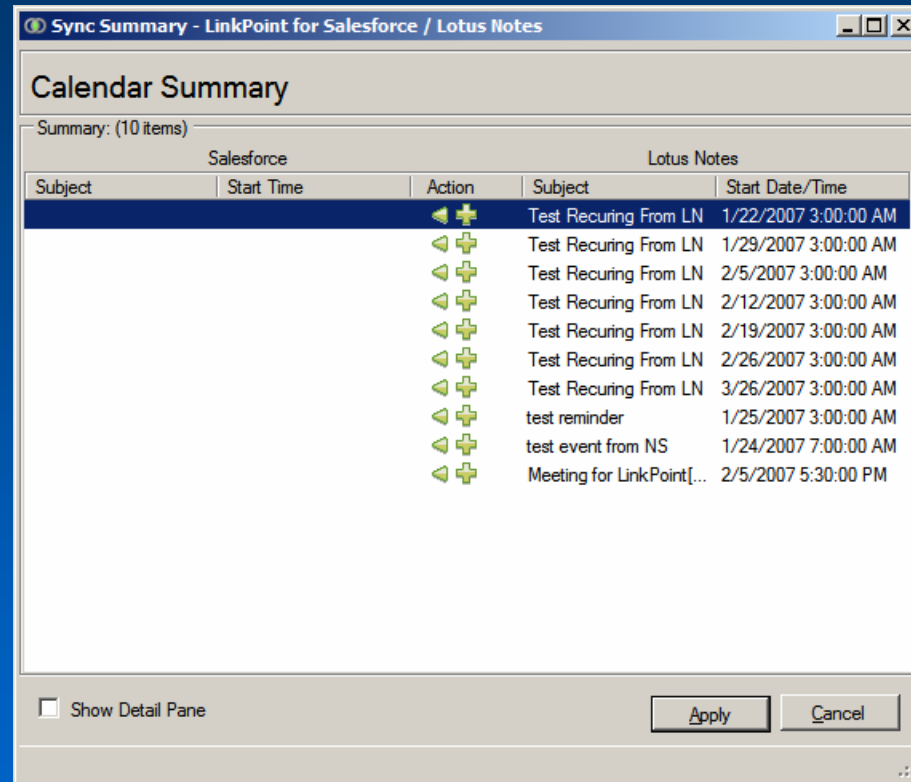
Calendar Synchronization

- 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 salesforce.com, check the “Mark Private” checkbox.

Calendar Synch Summary

Once LinkPoint evaluates the Calendar entries in both Lotus Notes and salesforce.com, 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



The screenshot shows a window titled "Sync Summary - LinkPoint for Salesforce / Lotus Notes". Inside, there is a "Calendar Summary" section with a sub-header "Summary: (10 items)". Below this is a table with columns for "Salesforce" and "Lotus Notes". The table has four columns: "Subject", "Start Time", "Action", and "Start Date/Time". The "Action" column contains green arrows pointing left and right, indicating synchronization directions. The "Start Date/Time" column shows dates and times for each entry.

Salesforce		Lotus Notes	
Subject	Start Time	Action	Start Date/Time
		← +	Test Recuring From LN 1/22/2007 3:00:00 AM
		← +	Test Recuring From LN 1/29/2007 3:00:00 AM
		← +	Test Recuring From LN 2/5/2007 3:00:00 AM
		← +	Test Recuring From LN 2/12/2007 3:00:00 AM
		← +	Test Recuring From LN 2/19/2007 3:00:00 AM
		← +	Test Recuring From LN 2/26/2007 3:00:00 AM
		← +	Test Recuring From LN 3/26/2007 3:00:00 AM
		← +	test reminder 1/25/2007 3:00:00 AM
		← +	test event from NS 1/24/2007 7:00:00 AM
		← +	Meeting for LinkPoint[... 2/5/2007 5:30:00 PM

At the bottom of the window, there is a checkbox labeled "Show Detail Pane" which is currently unchecked. To the right of the checkbox are "Apply" and "Cancel" buttons.

Contact Synchronization

- LinkPoint synchronizes Contacts from salesforce.com 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 salesforce.com.

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 salesforce.com, check the “Mark Private” checkbox.

Questions & Answers

Why use LinkPoint?

- LinkPoint is integrated into your Lotus Notes software.
- LinkPoint supports Connected and Island Modes in Lotus Notes.

Is LinkPoint installed on the Domino Server or user Workstation?

- LinkPoint is installed only on the user's workstation and only requires a mail template change if the organization chooses.

What are the LinkPoint Requirements?

- Lotus Notes Release 5.05 or greater.

What business entities in salesforce.com can I record to?

- Account, Contact, Opportunity, or Case.

Contact Information

LinkPoint360

64A White Street

Red Bank, New Jersey 07701

Sales: 732-212-8401

Support: 732-212-8403

E-mail: info@LinkPoint360.com

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