

LinkPoint for salesforce.com

Data Synchronization Tutorial

Lotus Notes Edition



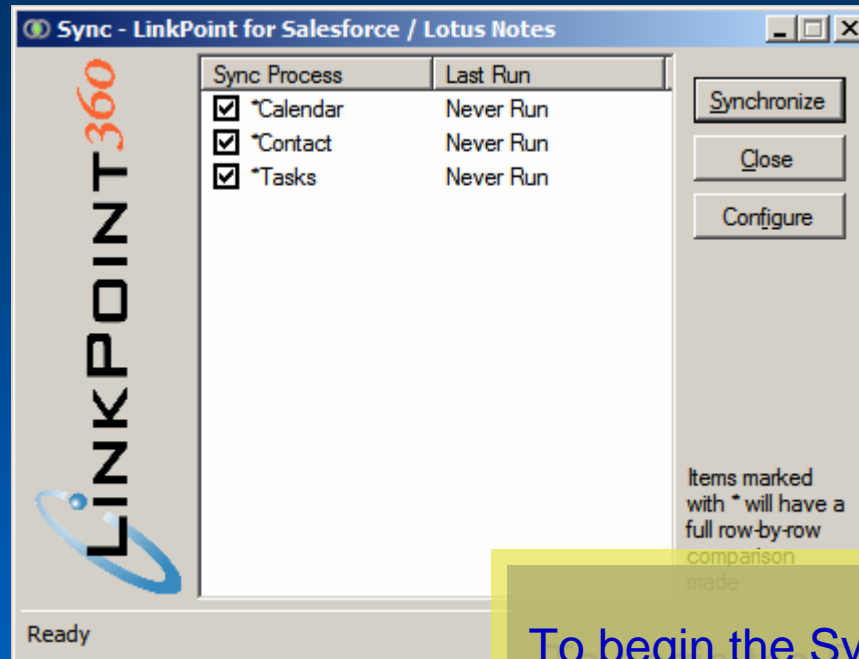
LinkPoint Synchronization Capabilities...

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

Sync Summary - LinkPoint for Salesforce / Lotus Notes

Calendar Summary

Summary: (10 items)

Salesforce			Lotus Notes	
Subject	Start Time	Action	Subject	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 5:00:00 AM
		◀ +	test event from NS	1/24/2007 7:00:00 AM
		◀ +	Meeting for LinkPoint[...	2/5/2007 5:30:00 PM

Show Detail Pane

Apply

Calendar Summary

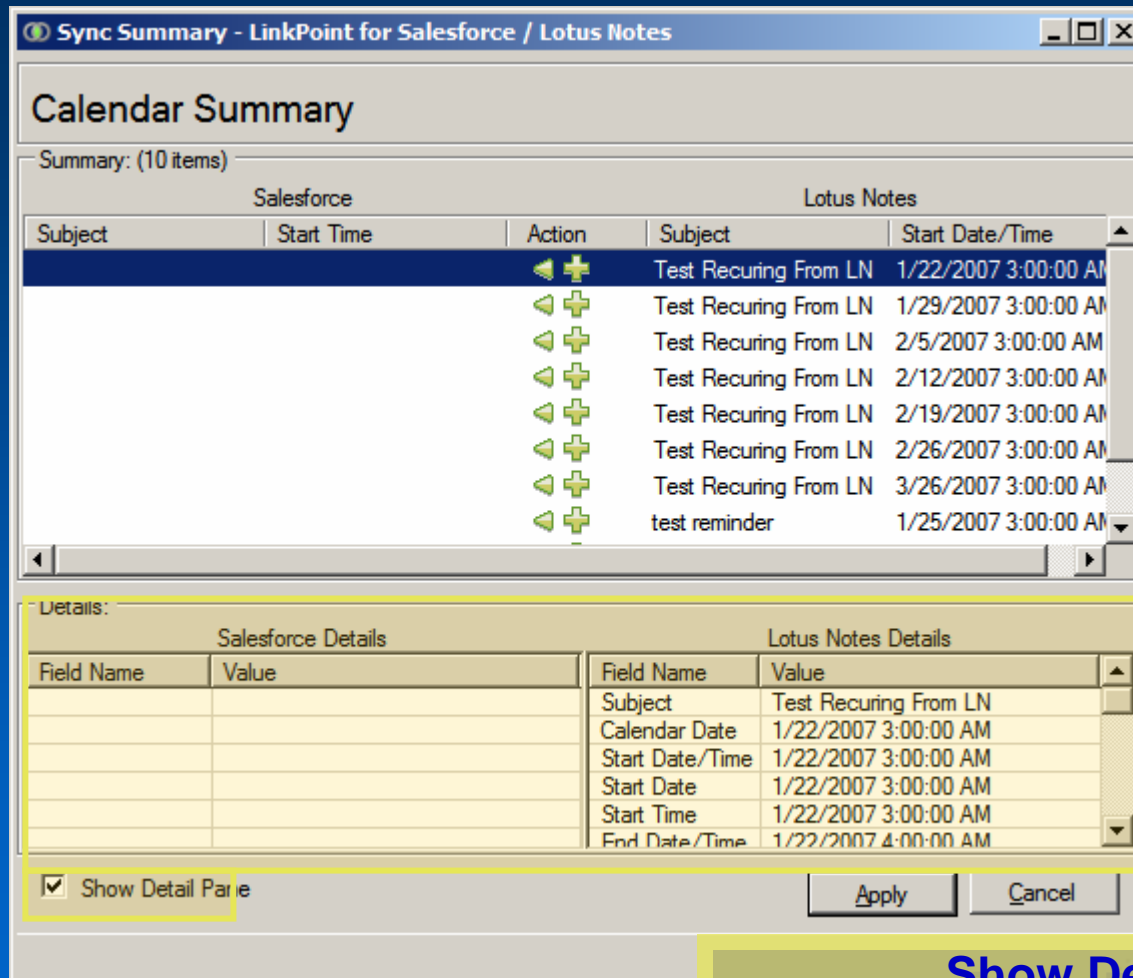
Once LinkPoint evaluates the Calendar entries in both Lotus Notes and salesforce.com, if there are any changes, LinkPoint will display the Calendar Summary Screen.

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

Action Key

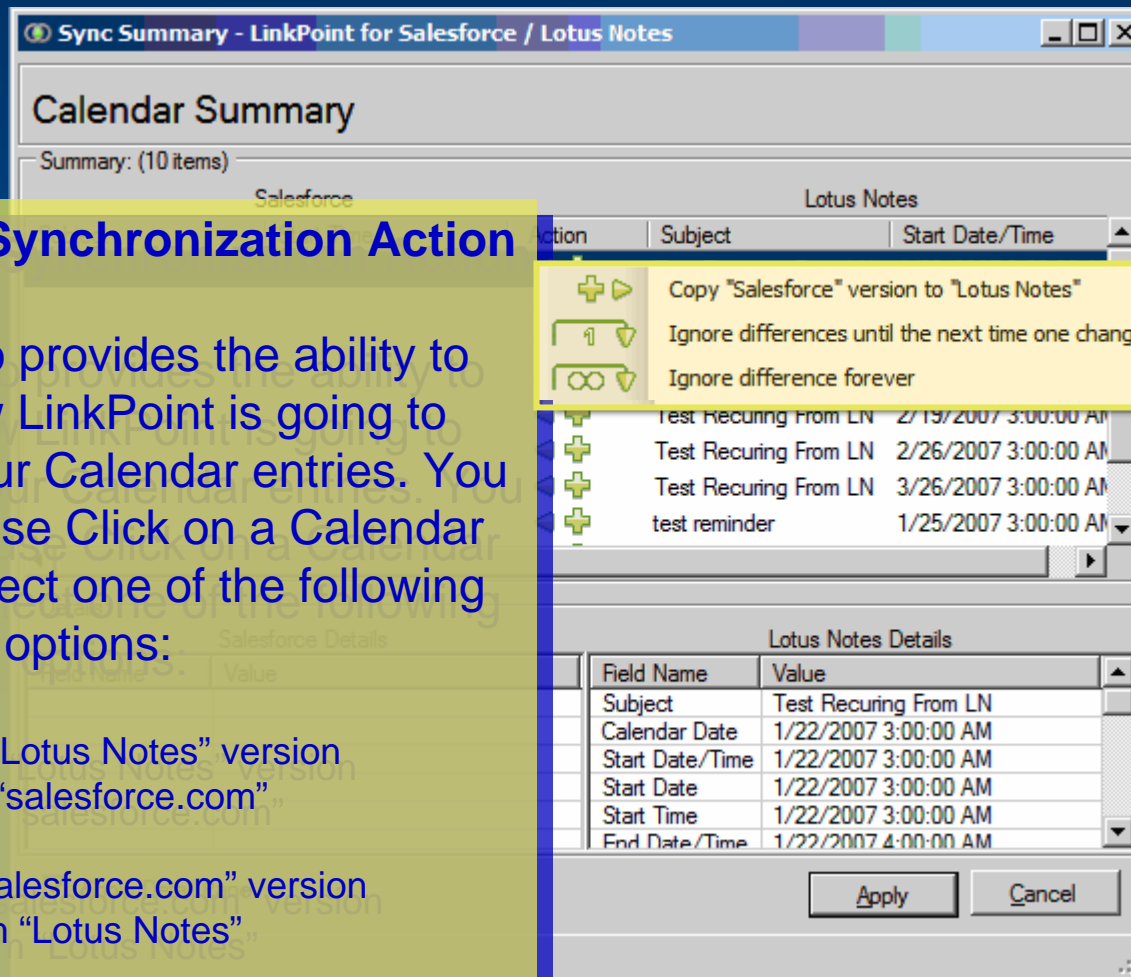
- ◀ ✖ Delete From salesforce.com
- ✖ ▶ Delete From salesforce.com
- + ▶ Add to Lotus Notes
- ◀ + Add To salesforce.com
- ↻ ▶ Update Lotus Notes
- ◀ ↻ Update salesforce.com

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 “salesforce.com”
- Update “salesforce.com” version from “Lotus Notes”
- Ignore differences until the next time one changes
- Ignore differences forever

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.

Sync Summary - LinkPoint for Salesforce / Lotus Notes

Contact Summary

Summary: (2/00 items)

Salesforce

Last Name	First Name	Email Address 1	Action	Last Name
Rubble	Bamey	bamey.rubble...	+ ▶	
Pheasey	Frederick	frederickphea...	+ ▶	
Watson	Tim	timwatson@li...	+ ▶	
Webb	Thomas	thomaswebb...	+ ▶	
Welch	Jery	jerywelch@li...	+ ▶	
Wilhite	Steve	stevewilhite...	+ ▶	
Williams	Geisha	geishawilliam...	+ ▶	
Wilson	Steve	stevewilson...	+ ▶	
Wright	Gregory	gregorywright...	+ ▶	
Yackira	Michael	michaelyackir...	+ ▶	
Yager	Jery	jeryyager@li...	+ ▶	
Yañez	Yañez	yañez@yañe...	+ ▶	
Yeaman	Eric	ericyeaman@...	+ ▶	
Flintstone	Wilma	wilma.flintston...	+ ▶	







Show Detail Pane

Contacts Summary

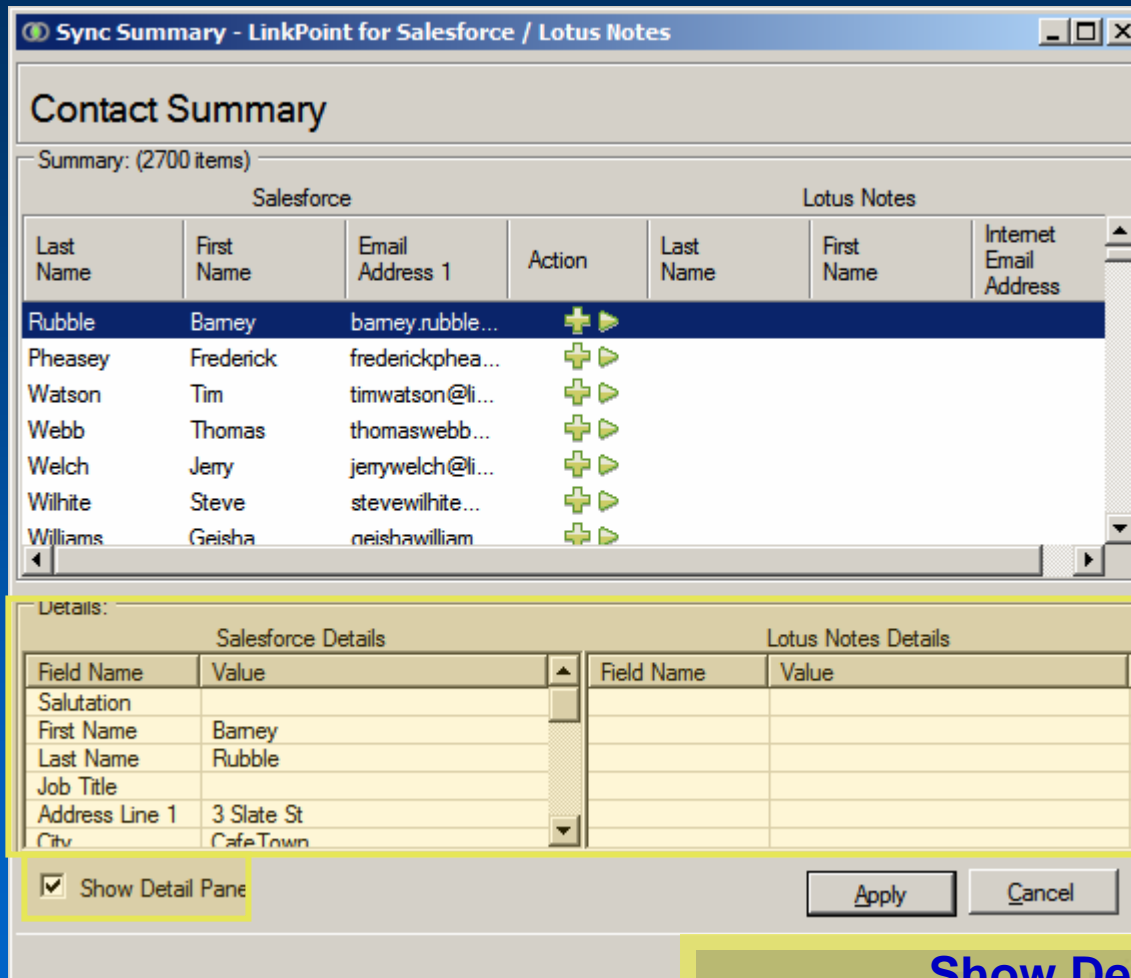
Once LinkPoint evaluates the Contact entries in both Lotus Notes and salesforce.com, if there are any changes, LinkPoint will display the Contacts Summary Screen.

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

System Action Key

-  Delete From salesforce.com
-  Delete From salesforce.com
-  Add to Lotus Notes
-  Add To salesforce.com
-  Update Lotus Notes
-  Update salesforce.com

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



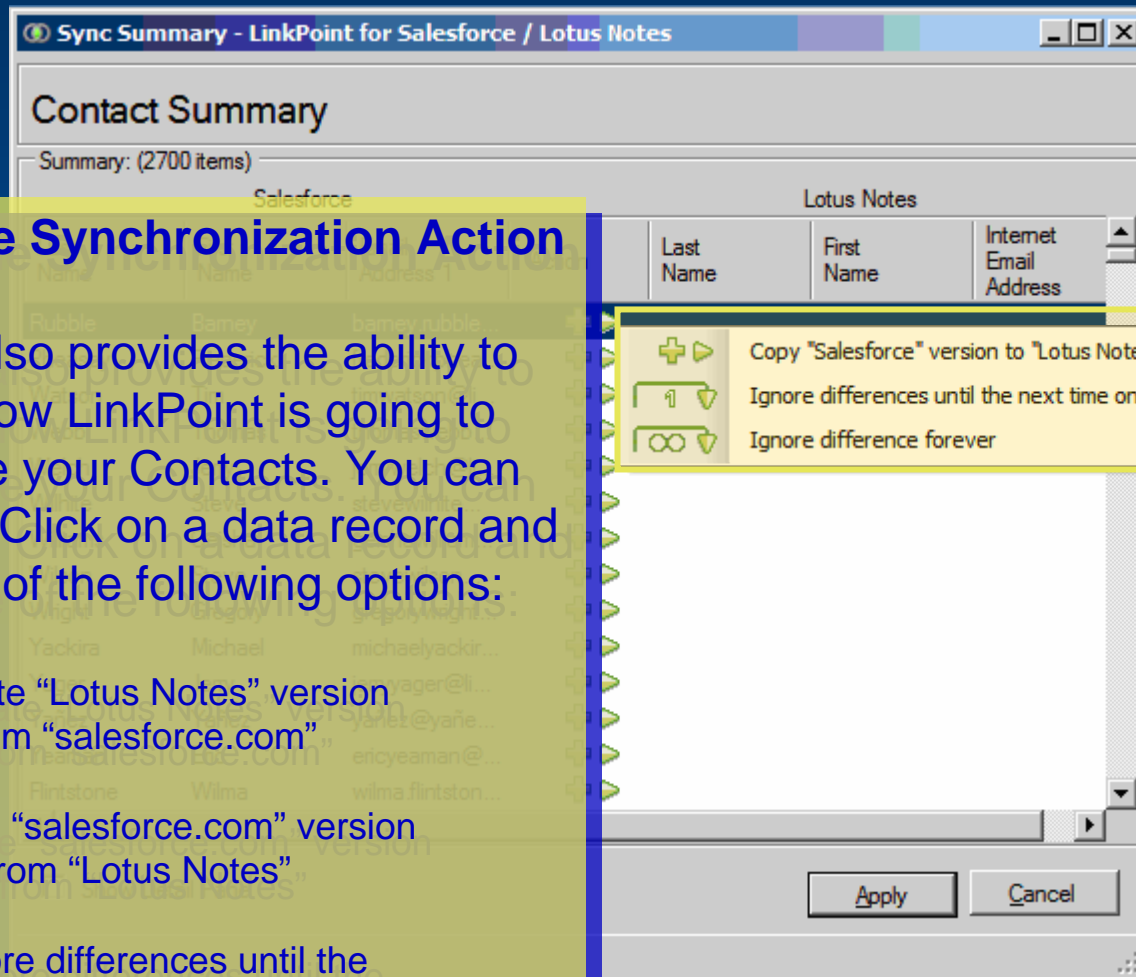
Show Detail Pane

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

Changing the Synchronization Action

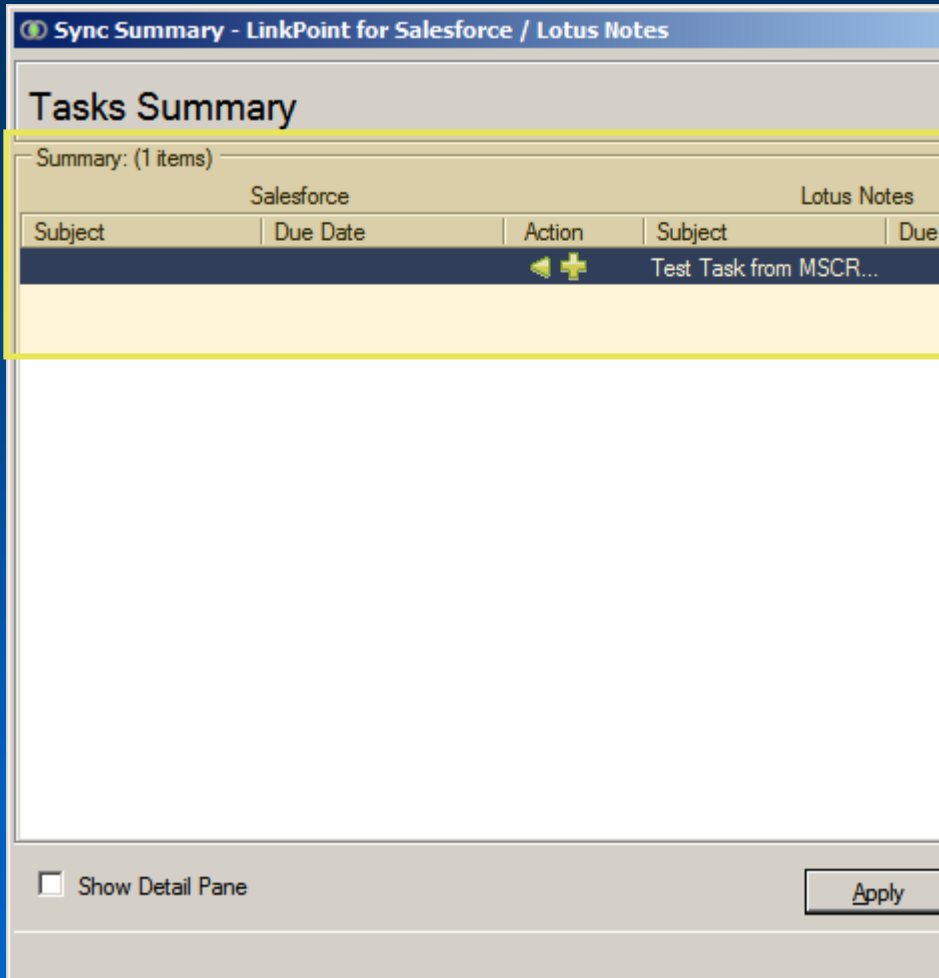
LinkPoint also provides the ability to override how LinkPoint is going to synchronize your Contacts. You can Right Mouse Click on a data record and select one of the following options:

- Update “Lotus Notes” version from “salesforce.com”
- Update “salesforce.com” 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 salesforce.com, check the “Mark Private” checkbox.









Tasks Summary

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

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

Sync Summary - LinkPoint for Salesforce / Lotus Notes

Tasks Summary

Summary: (1 items)

Salesforce			Lotus Notes	
Subject	Due Date	Action	Subject	Due Date
		◀ +	Test Task from MSCR...	

Details:

Salesforce Details		Lotus Notes Details	
Field Name	Value	Field Name	Value
		Subject	Test Task from MSCRM[Jean L...
		Start Date/Time	
		Start Date	
		Start Time	
		Due Date	
		Due Date/Time	

Show Detail Pane

Apply Cancel

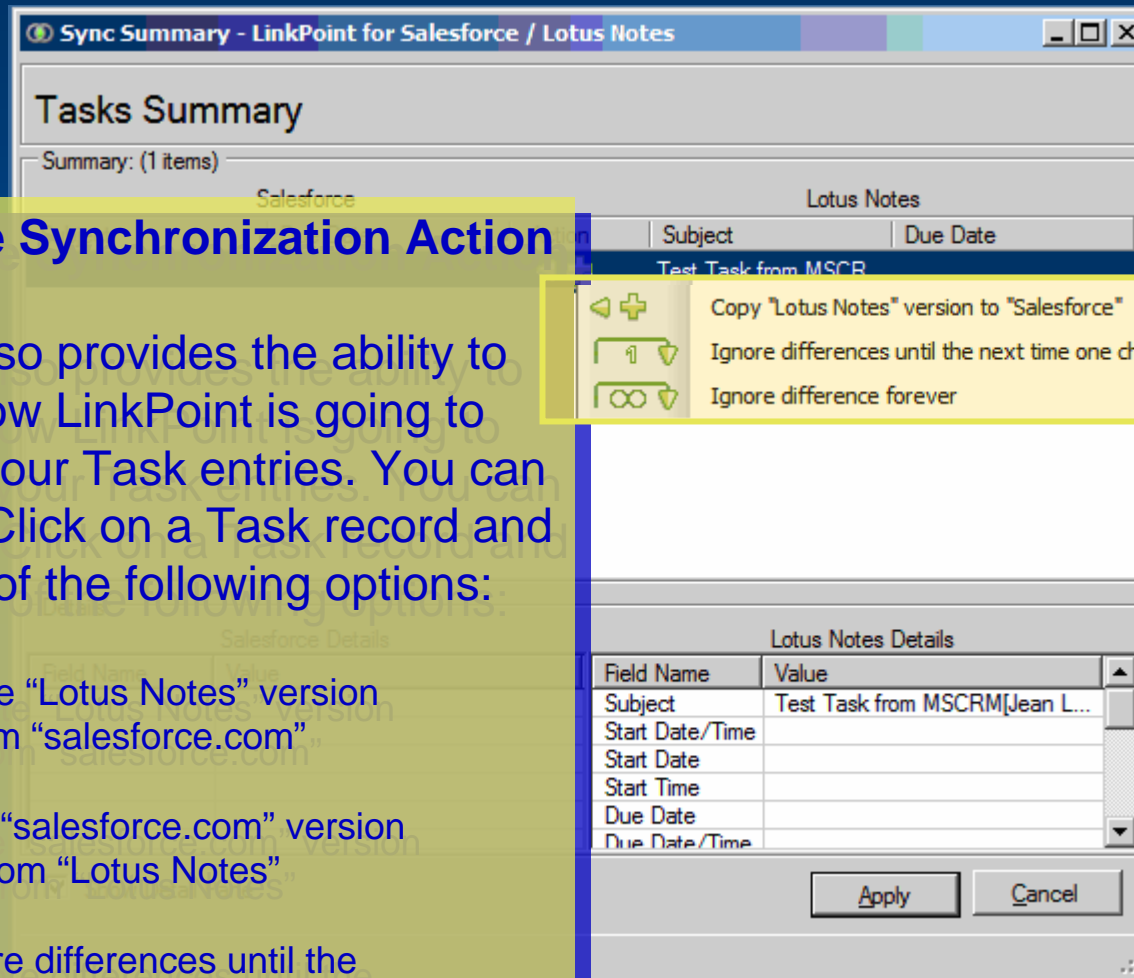
Show Detail Pane

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 “salesforce.com”
- Update “salesforce.com” 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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