



LinkPoint for Pivotal CRM

Installation Tutorial

Lotus Notes Edition



Installation Overview...

LinkPoint's 3 Step Installation Process

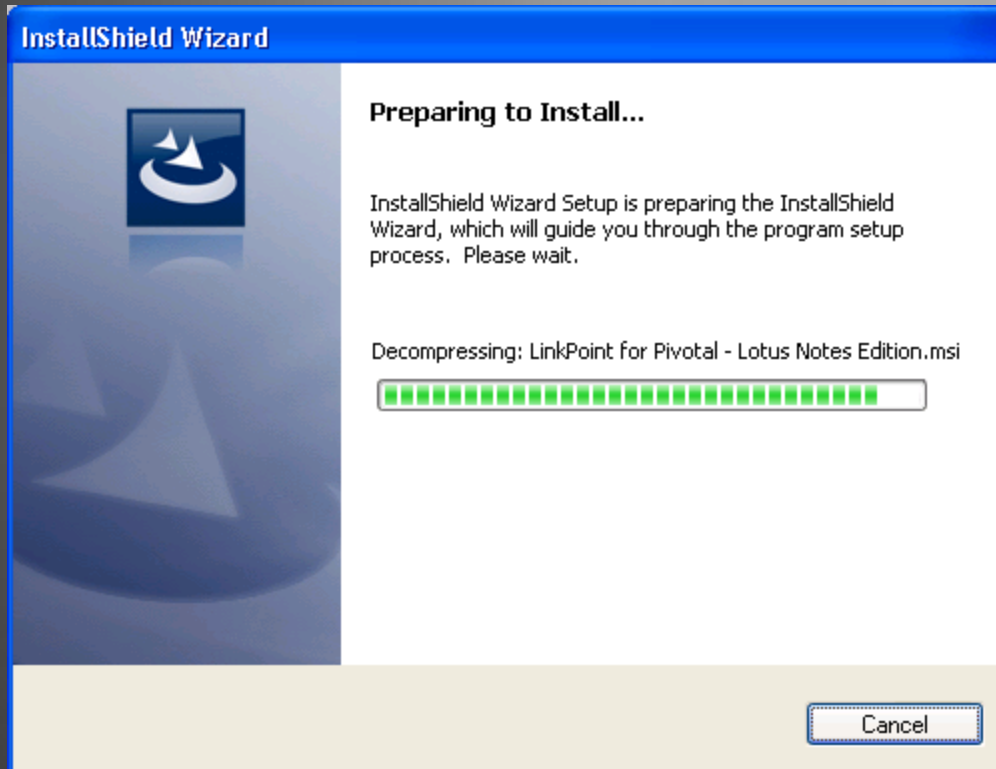
- 1. LinkPoint Software Installation.**
- 2. LinkPoint Software Configuration.**
- 3. Lotus Notes Component Installation.**

Step 1

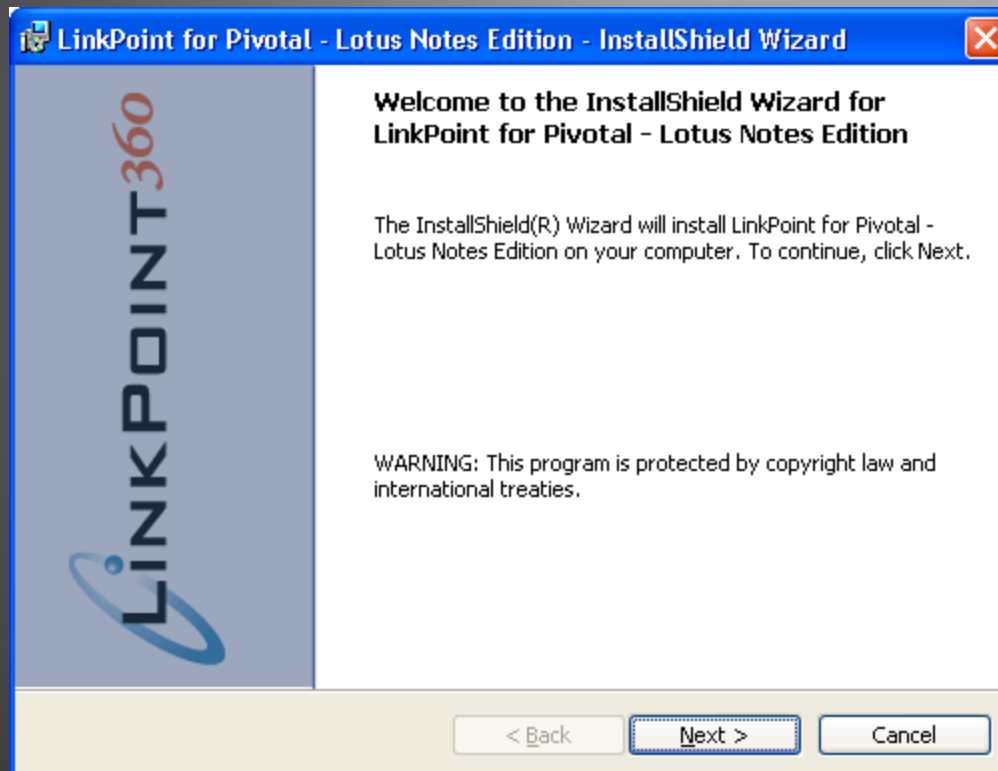
LinkPoint Software Installation



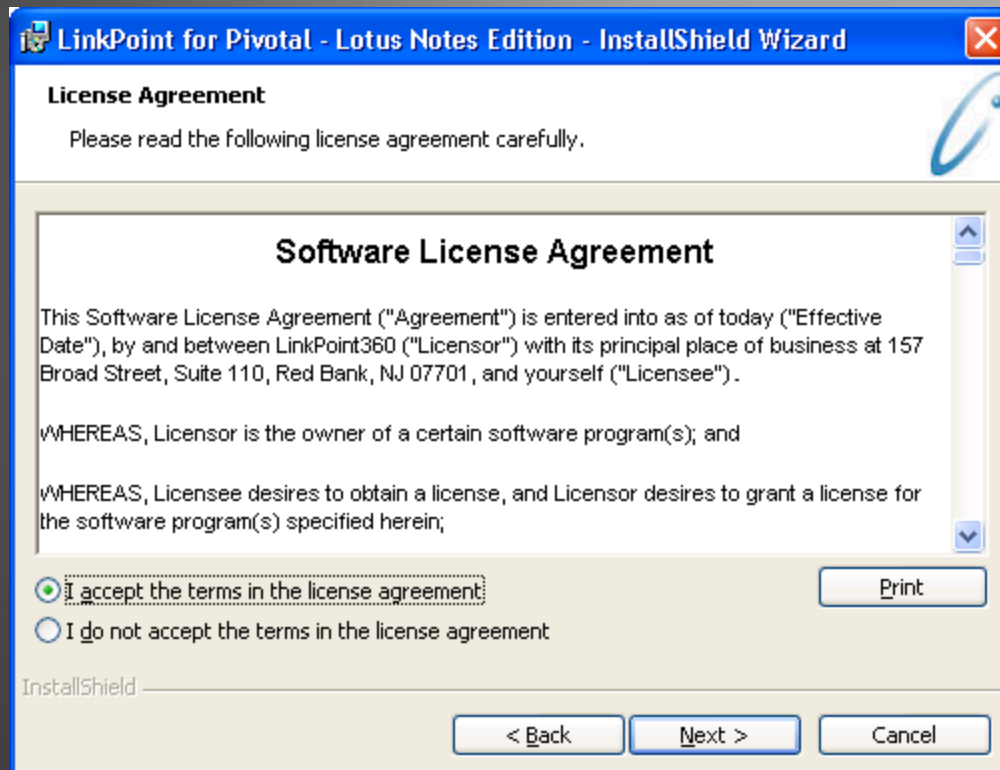
Start the LinkPoint for Pivotal CRM installation.



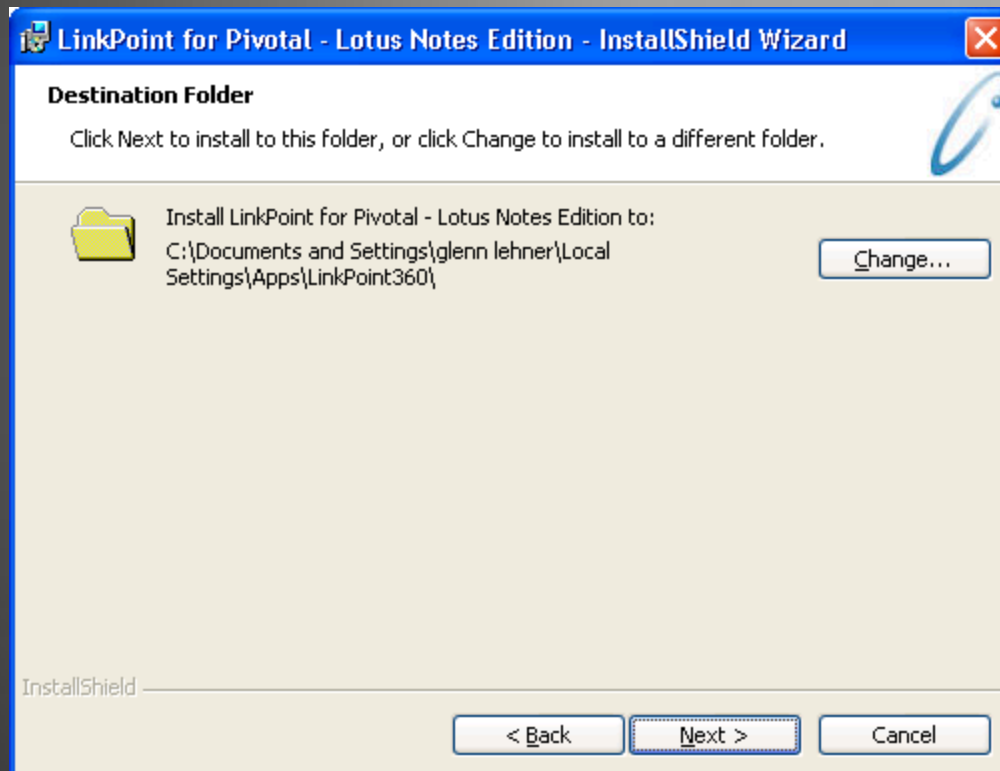
The LinkPoint installation wizard will guide you through the installation.



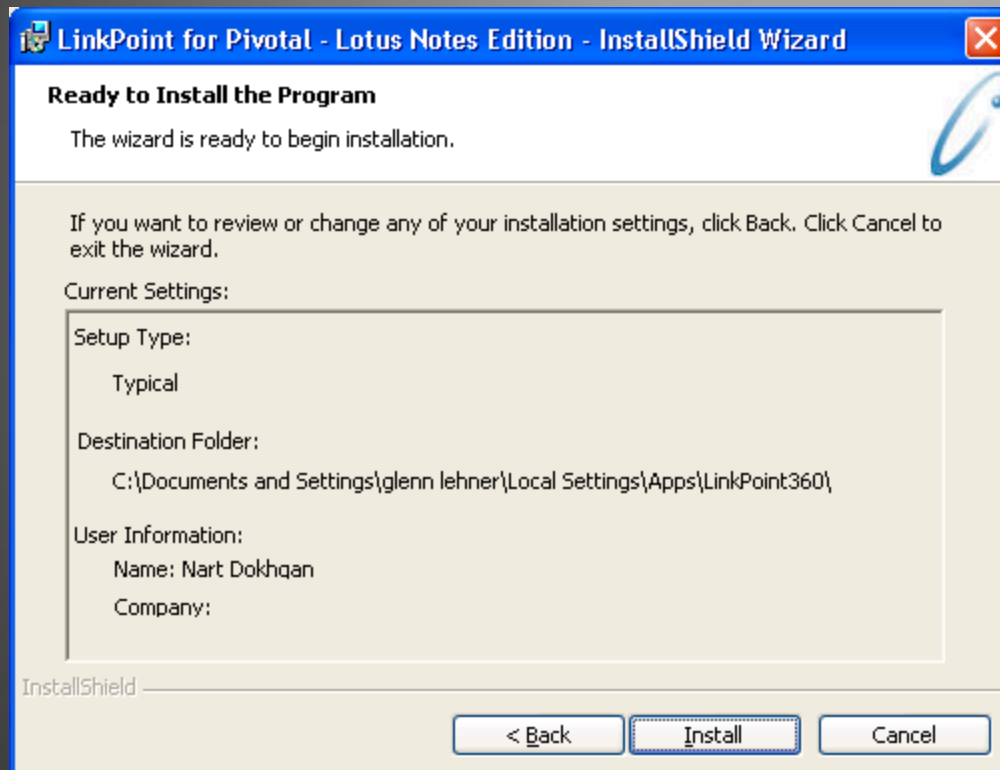
Click "Next" to begin the installation.



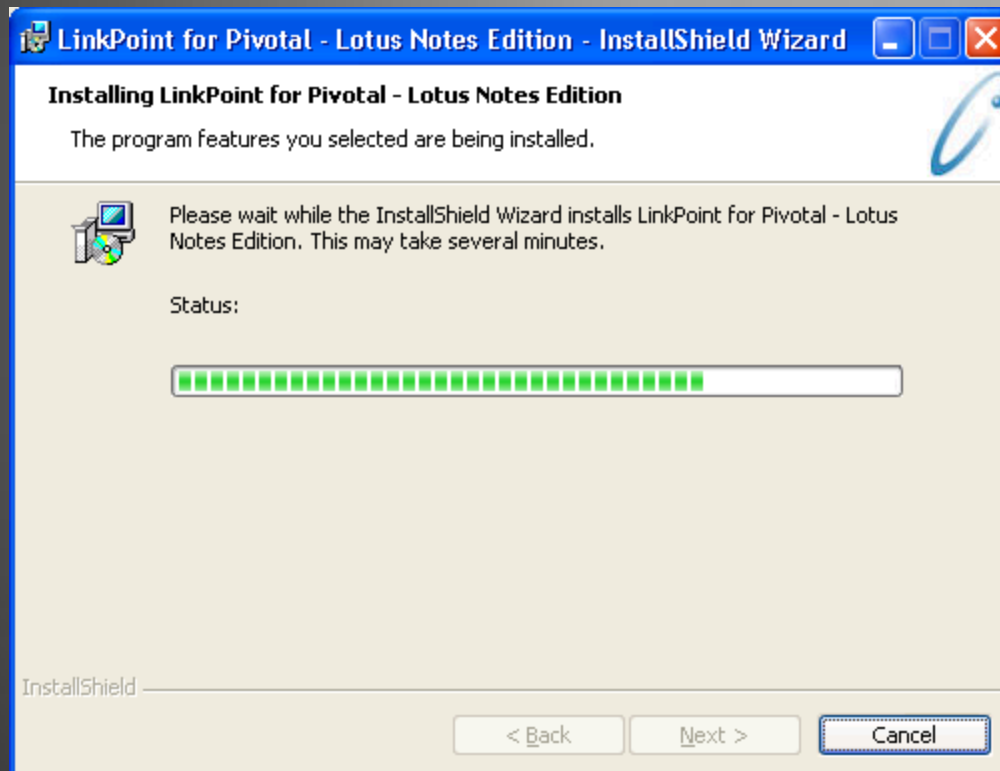
Click "I accept the terms in the license agreement", then click "Next".



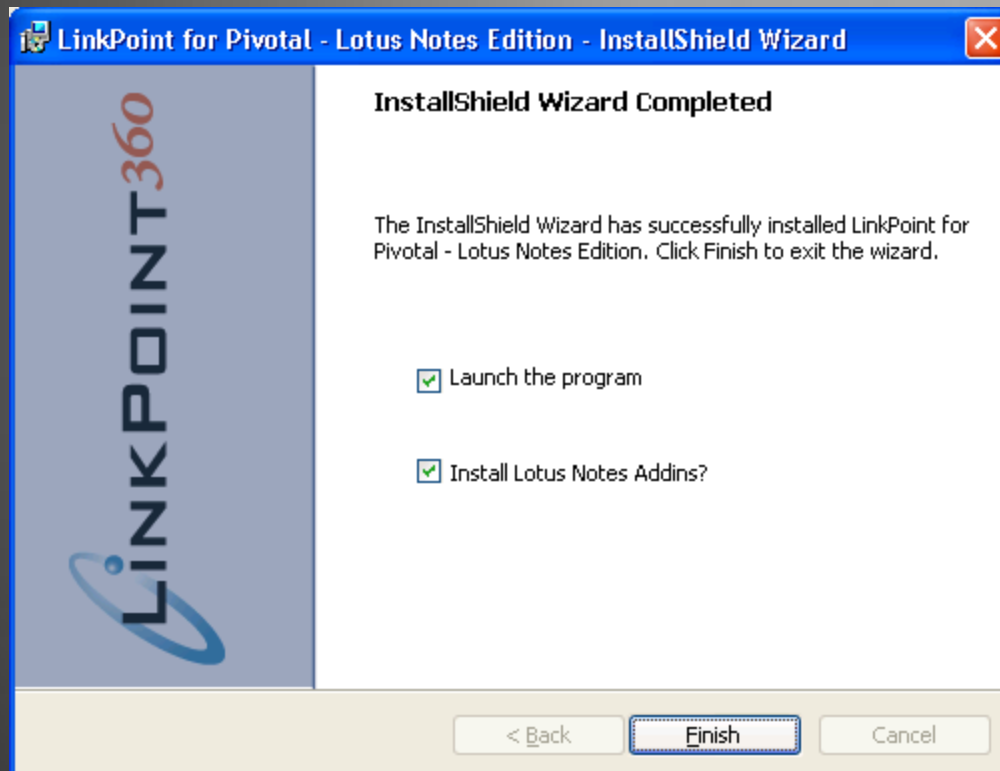
Click "Next" to accept the default installation folder.



Click "Install" to begin the installation.



The LinkPoint install wizard is now installing the software. This may take several minutes.



Click "Finish" to configure the LinkPoint software and to install the Lotus Notes Component.

Step 2

LinkPoint Software Configuration

LinkPoint Assist - LinkPoint for Pivotal (Lotus Notes Edition)

Ok Cancel Apply Shutdown

Credentials

- Hosts
- Record Options
- Synchronization
- Web Proxy Server
- Software Updates
- Other/Support

License Information:

Email Address:

Pass Key:

Your license to evaluate this software will expire on Friday, December 31, 2010

Pivotal Credentials:

User Name:

Password: Confirm:

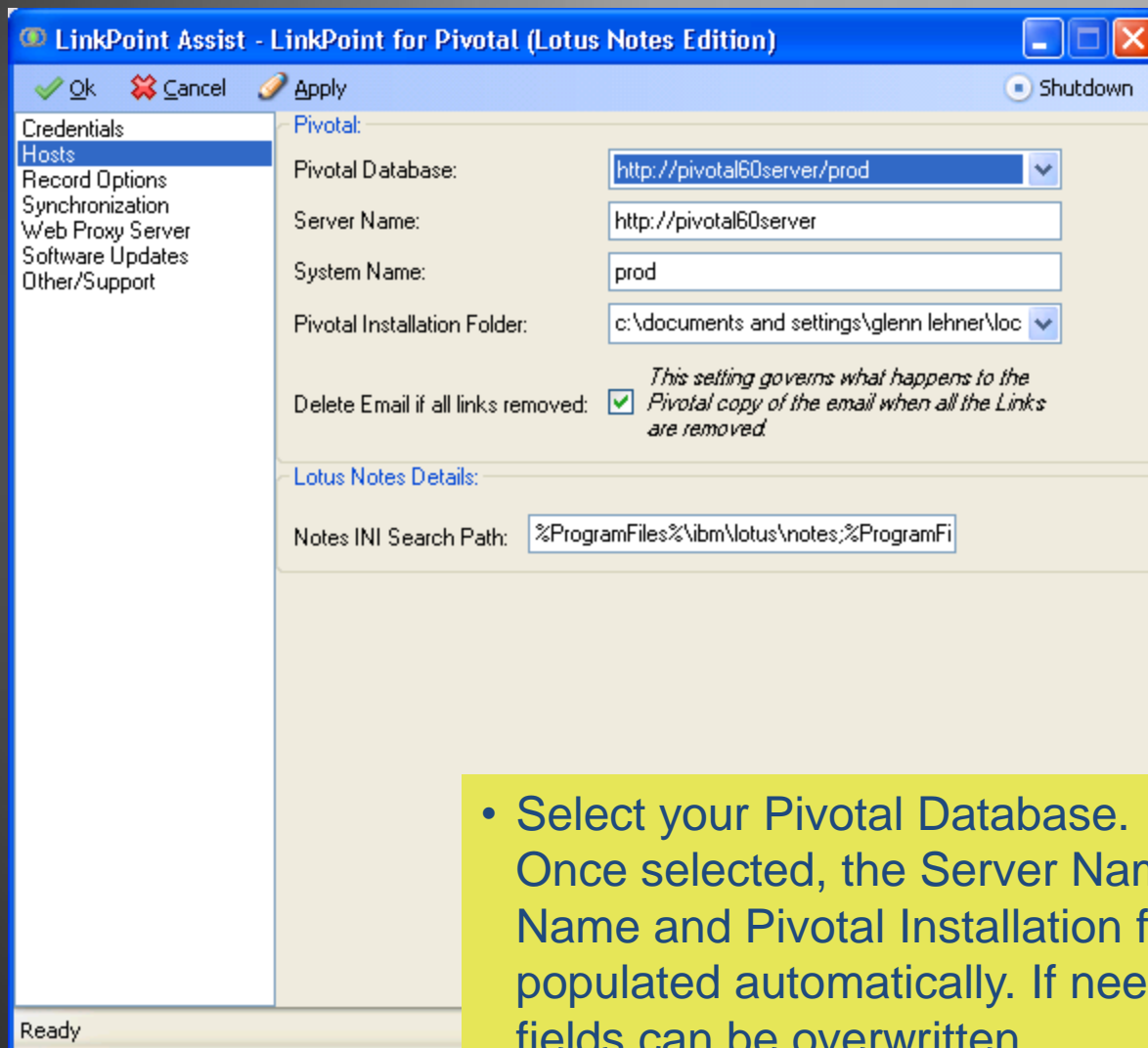
Lotus Notes Credentials:

User Name:

Password: Confirm:

Ready

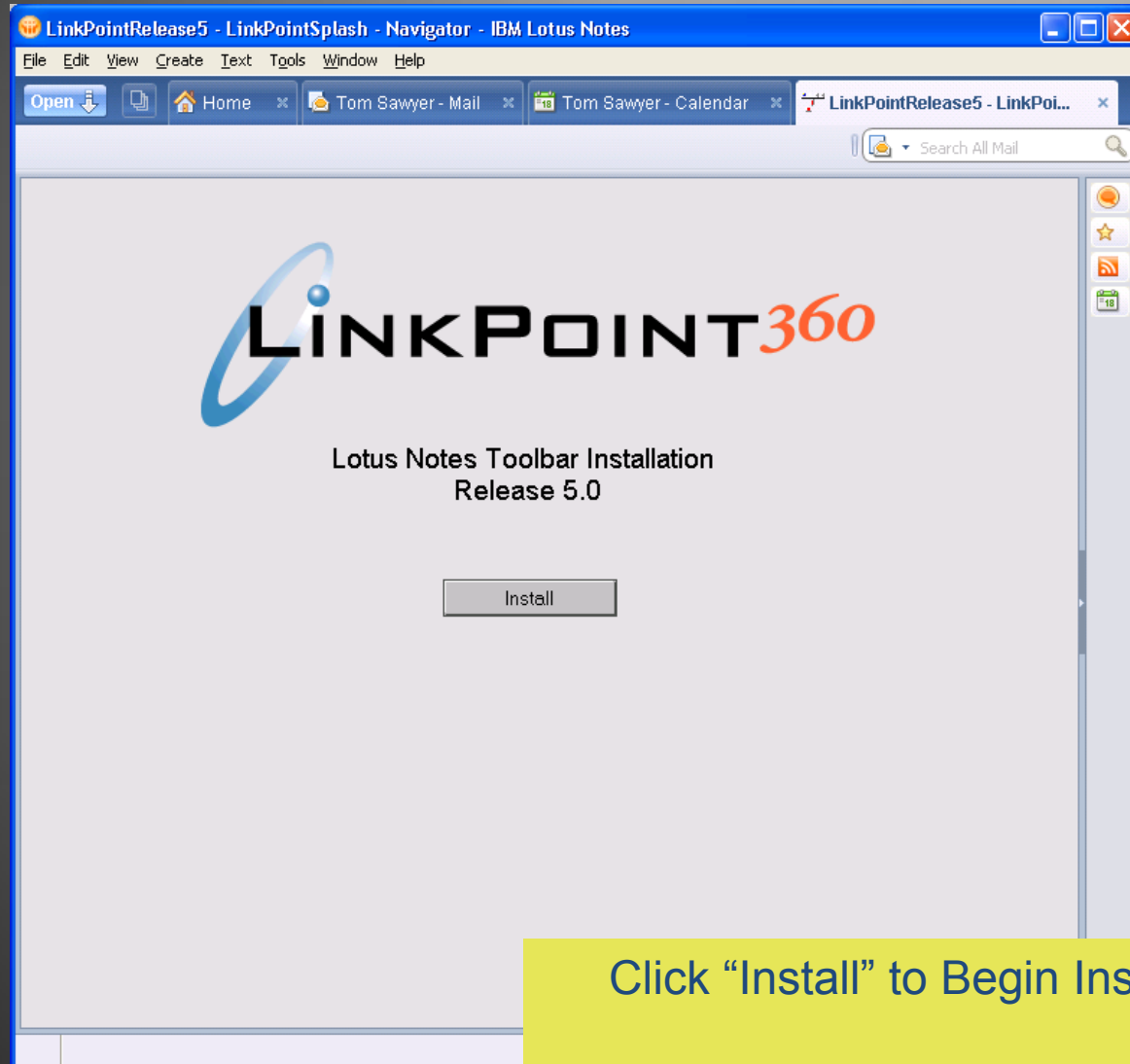
- Enter your email address.
- Enter the Pass Key supplied to you from LinkPoint360. The Pass Key is only available when you purchase the software.
- Enter your Lotus Notes password.
- Click Apply to save the LinkPoint Configuration.



- Select your Pivotal Database. Once selected, the Server Name, System Name and Pivotal Installation folder will be populated automatically. If needed, these fields can be overwritten.
- Click Ok to save and close the LinkPoint Configuration.

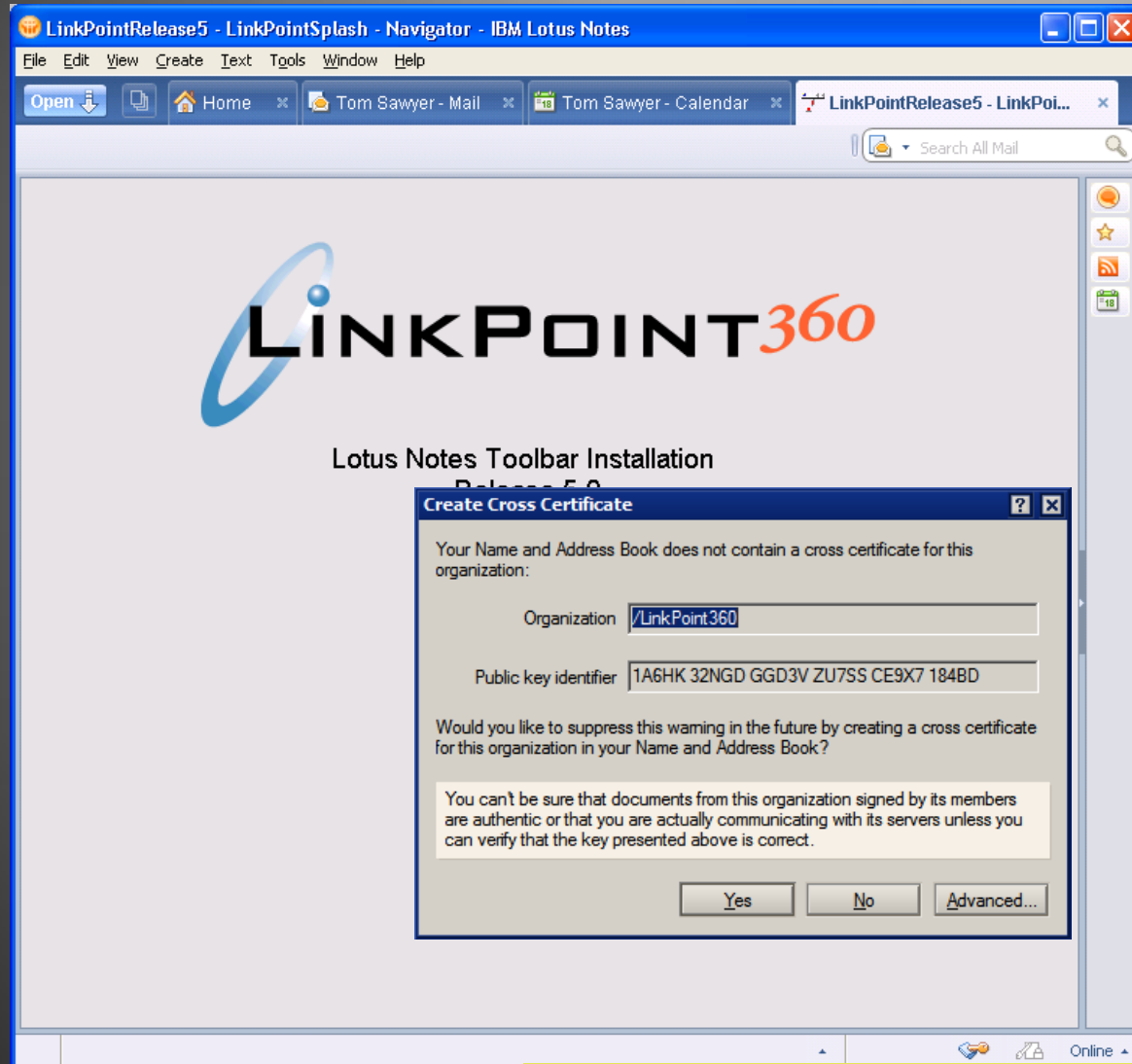
Step 3

Lotus Notes Component Installation

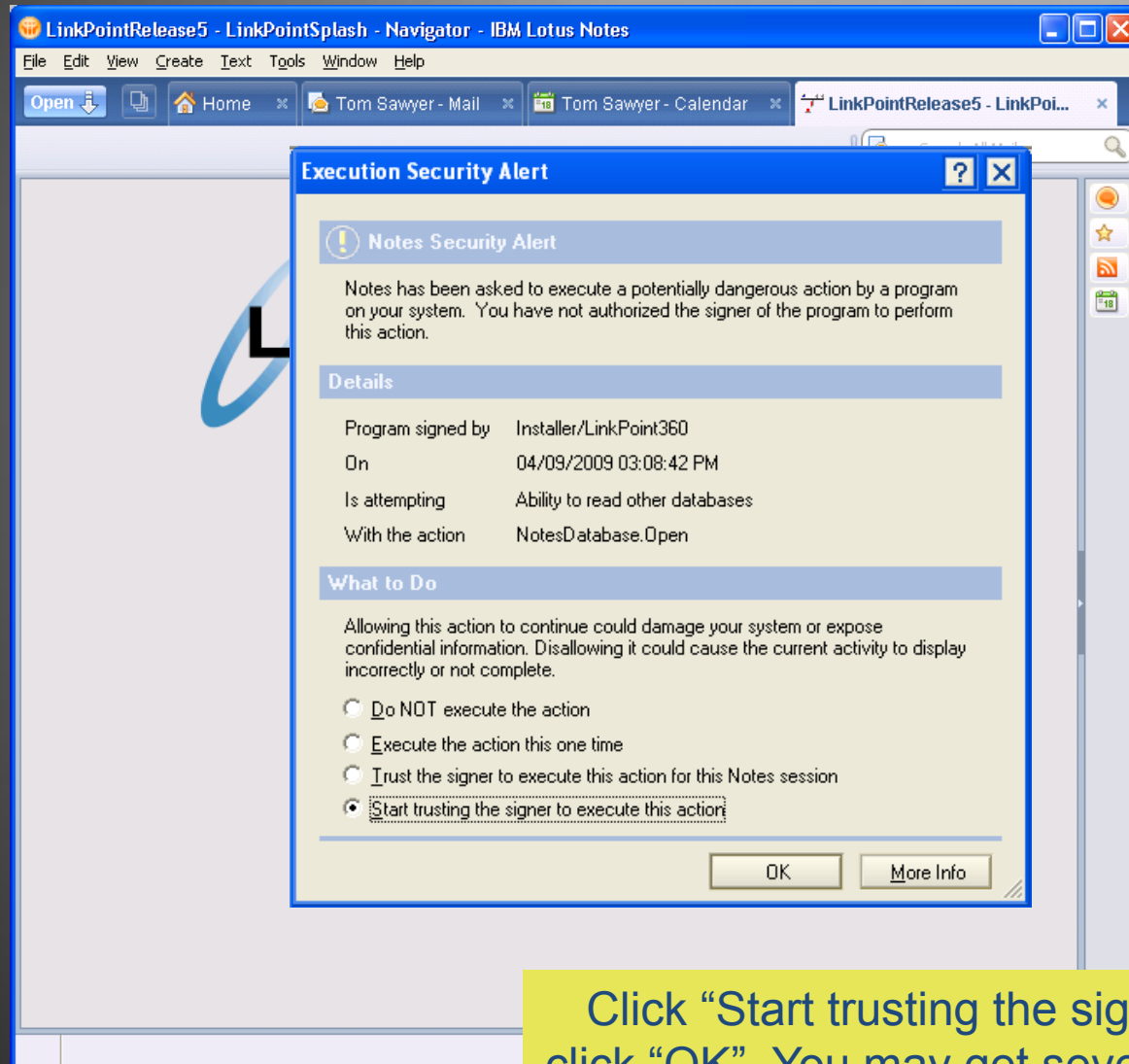


Click "Install" to Begin Installation.

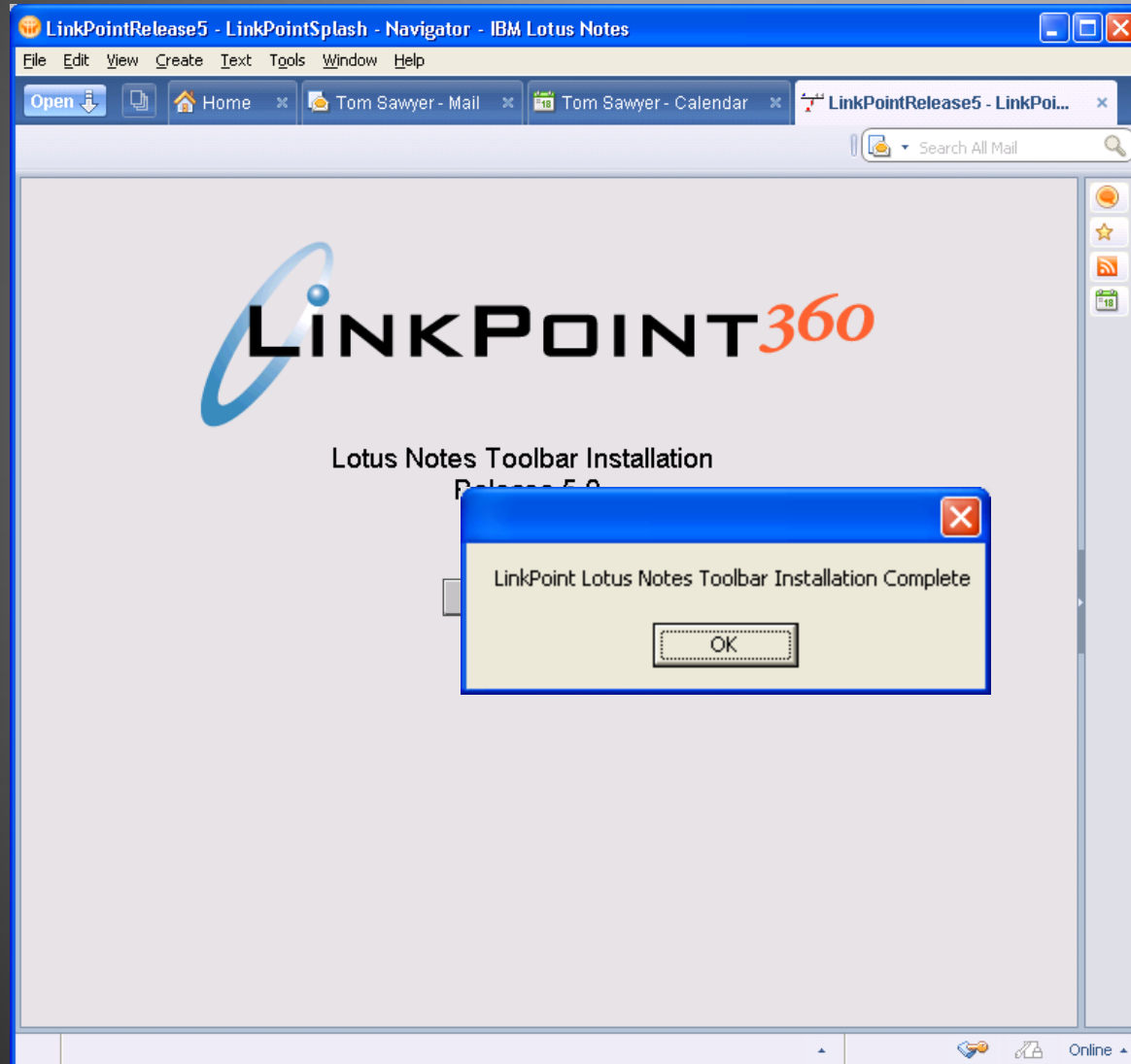
This will install the LinkPoint toolbar buttons into Lotus Notes.



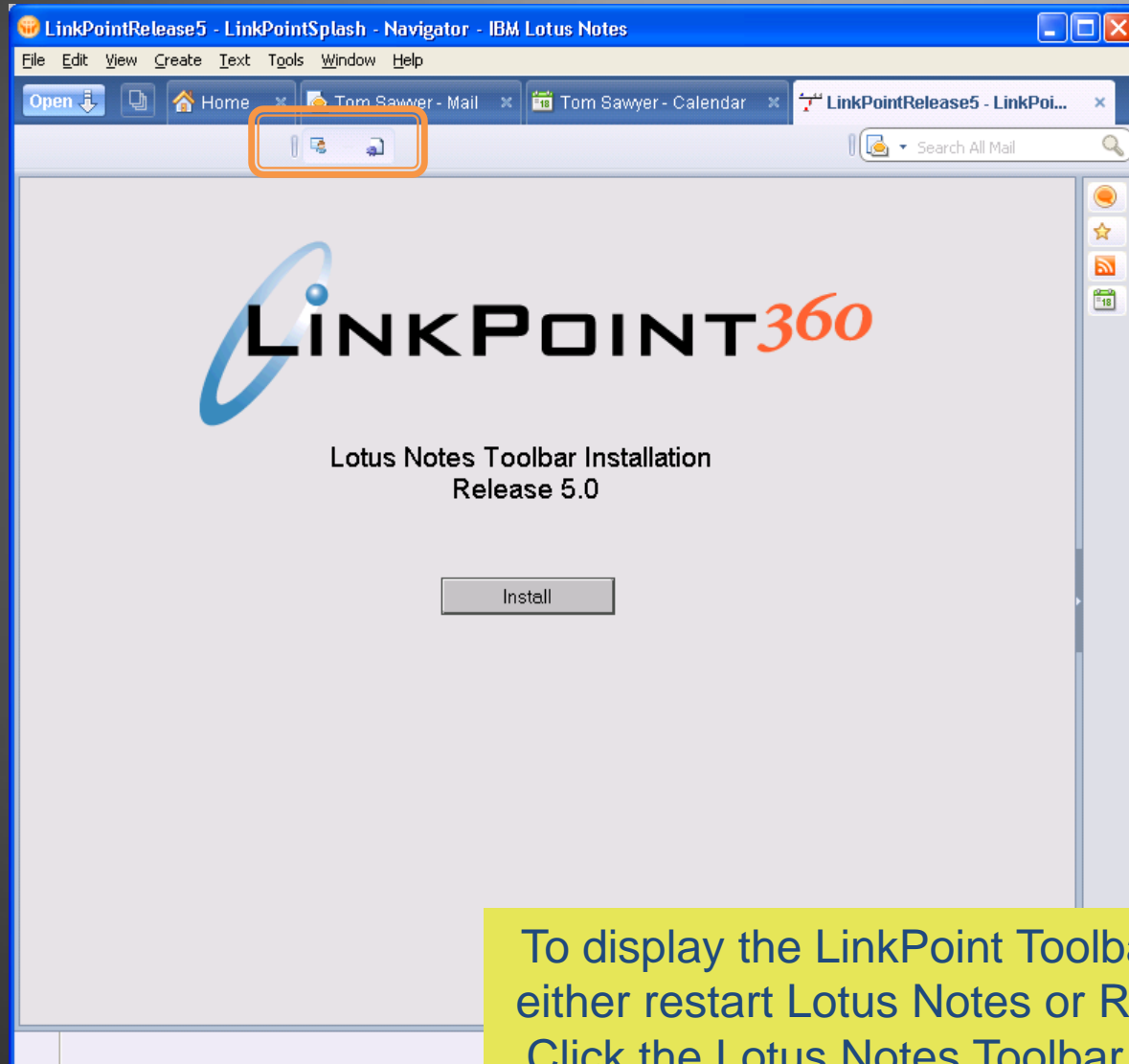
Click "Yes" to accept the LinkPoint Certificate.



Click "Start trusting the signer", then click "OK". You may get several of these screens throughout the installation process.



Lotus Notes Toolbar Installation is Complete Click "OK"



To display the LinkPoint Toolbar, you can either restart Lotus Notes or Right Mouse Click the Lotus Notes Toolbar and select to show the LinkPoint Toolbar. (You may have to select it twice).

Contact Information

The LinkPoint installation tutorial is now complete.
Please contact us for additional Sales or Support
questions.

Sales: 732-212-8402
Support: 732-212-8403

E-mail: info@LinkPoint360.com

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