LinkPoint for Pivotal CRM

Lotus Notes Installation

Copyright© 2006 LinkPoint360. All rights reserved

Overview…

There are two methods for users to access the LinkPoint functionality from within Lotus Notes.

- Menu and Toolbar items located in the Lotus Notes client.
- Button Menu’s added to the Lotus Notes mail template`

Menu and Toolbar's

- At the completion of the LinkPoint installation, the installer will open the LinkPoint Lotus Notes database.

- Three scripts are installed as local agents into the users mail database.
  - Address
    - Allows the user to use the CRM system as an address book.
  - Associate Links
    - Allows the user to select and edit how the document will be associated to the CRM Entity.
  - Associate Links (Listing)
    - Allows the user to select and edit how the document will be associated to the CRM Entity from a View Listing.

Menu and Toolbar's (Continued)

- **The installation of these scripts require the user to have the following security rights:**
  - **Create Private Agents**
  - **Create Lotus Scripts / Java Agents**
  - **Editor Access to their Mail Database**

Button Menu's

- For support, distribution and upgrade purposes, LinkPoint recommends that a custom or modified Mail Template be used for the users of the LinkPoint software. We provide a Lotus Notes database that contains the LinkPoint Lotus Notes scripts required.

- The LinkPoint Action Script Button (stored on the MemoScriptHolder form) can be added to the following forms:
  - Memo
  - Reply
  - Reply With History
  - _Calendar Entry

Button Menu's (Continued)

- The LinkPoint Script Library needs to be added to the Lotus Notes Mail Template.

Contact Information

LinkPoint360

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

E-mail: info@LinkPoint360.com

Web: http://www.linkpoint360.com