



LinkPoint for Pivotal CRM

User Tutorial

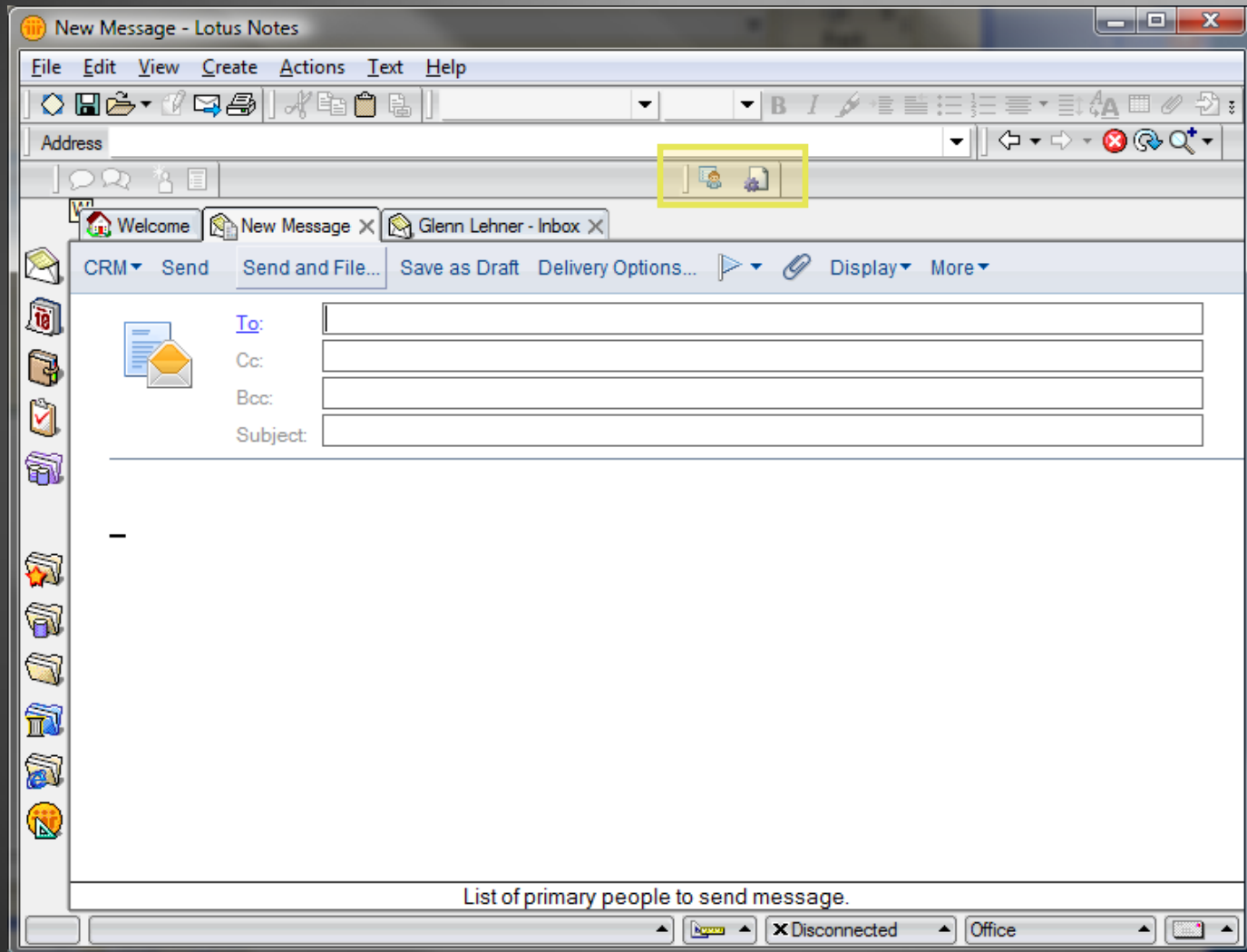


Email Tutorial Overview...

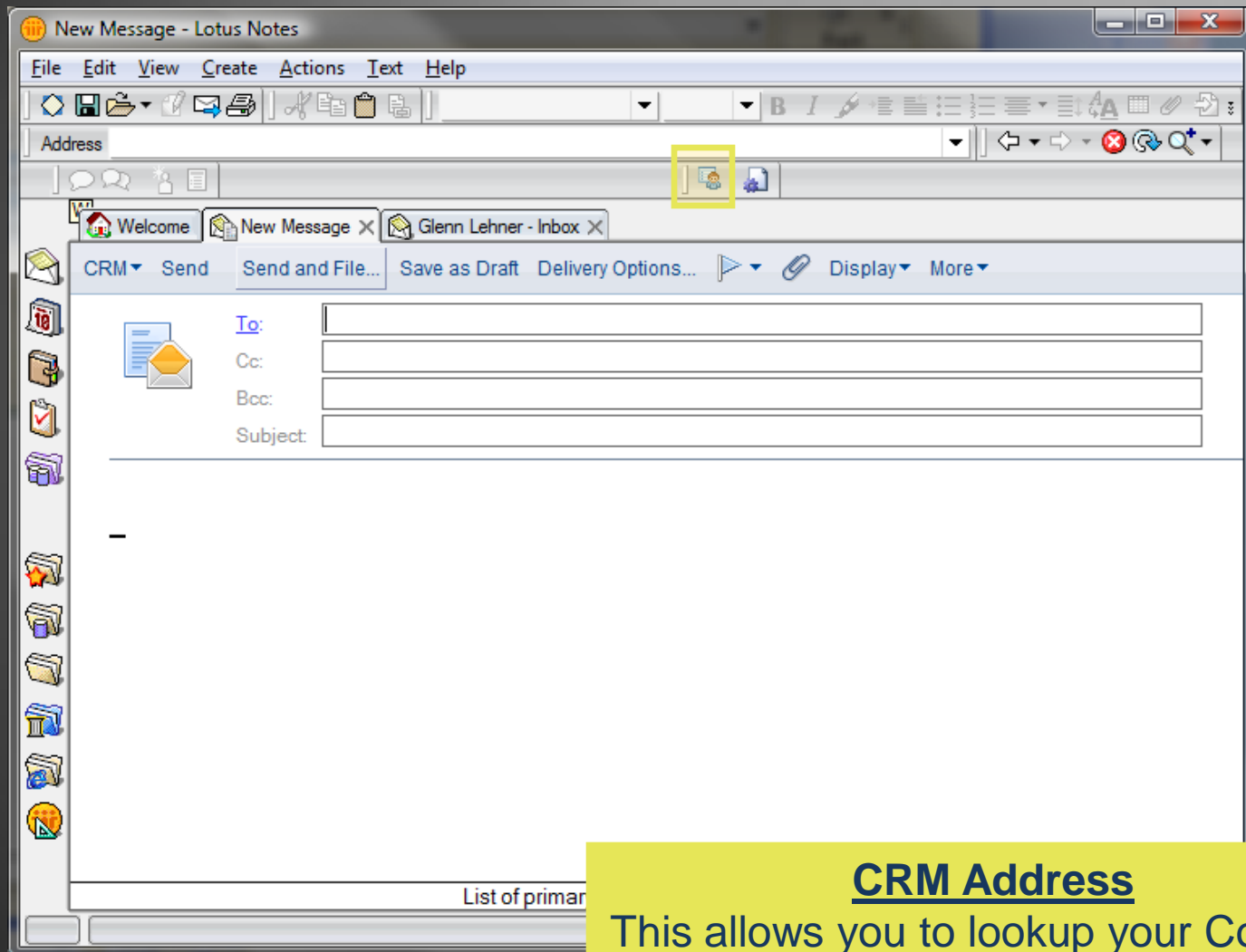
1. How to access LinkPoint from Lotus Notes.
2. How to use the LinkPoint CRM Address book to add recipients to an Email or Calendar Meeting invitation.
3. How to Associate an Email, Calendar Entry or Task to Pivotal CRM.

Step 1

**How to access LinkPoint
from Lotus Notes.**

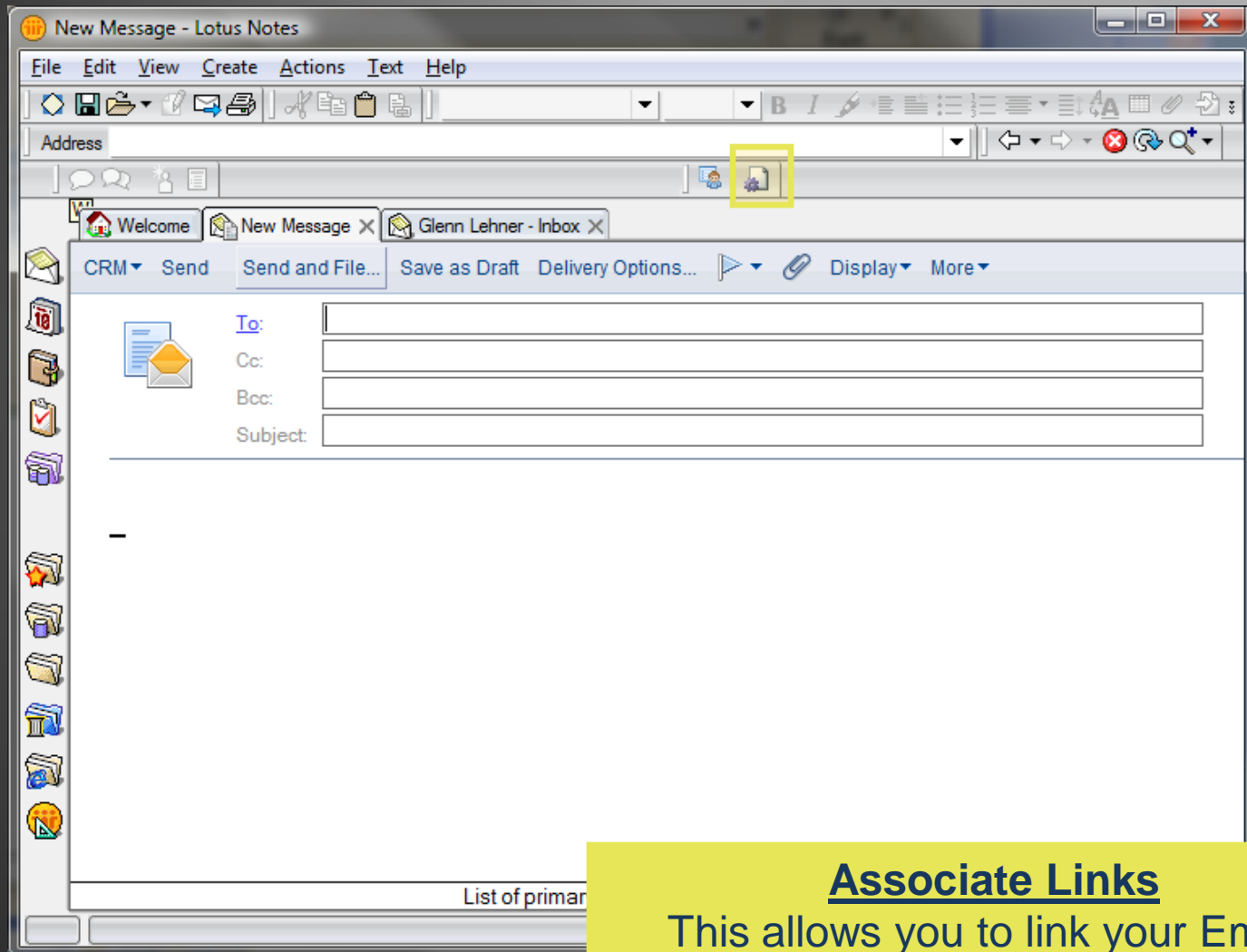


Once Installation is complete you will have 2 new LinkPoint toolbar buttons.



CRM Address

This allows you to lookup your Contacts or Leads directly from Pivotal CRM and use them as recipients in your Email or Meeting invitations.

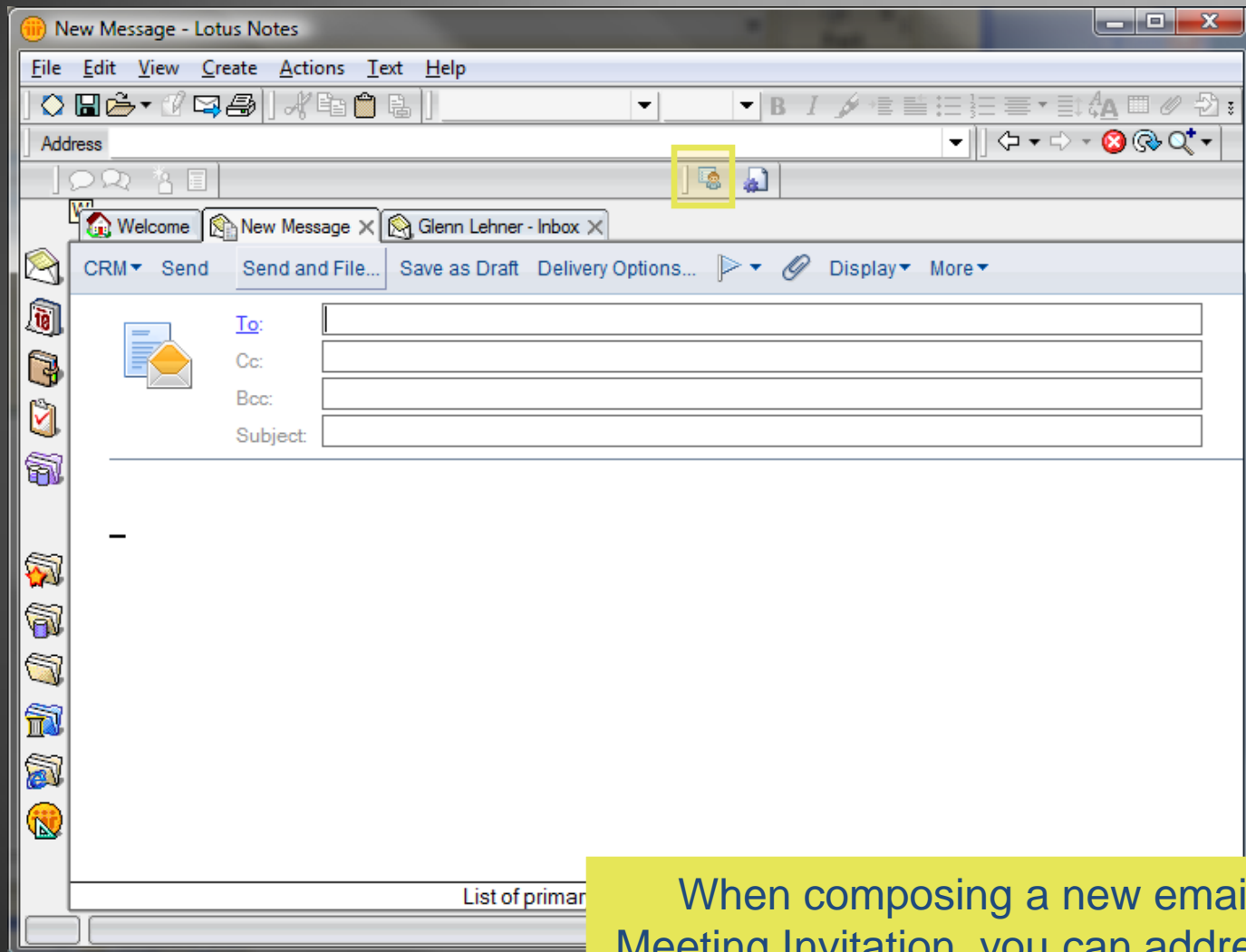


Associate Links

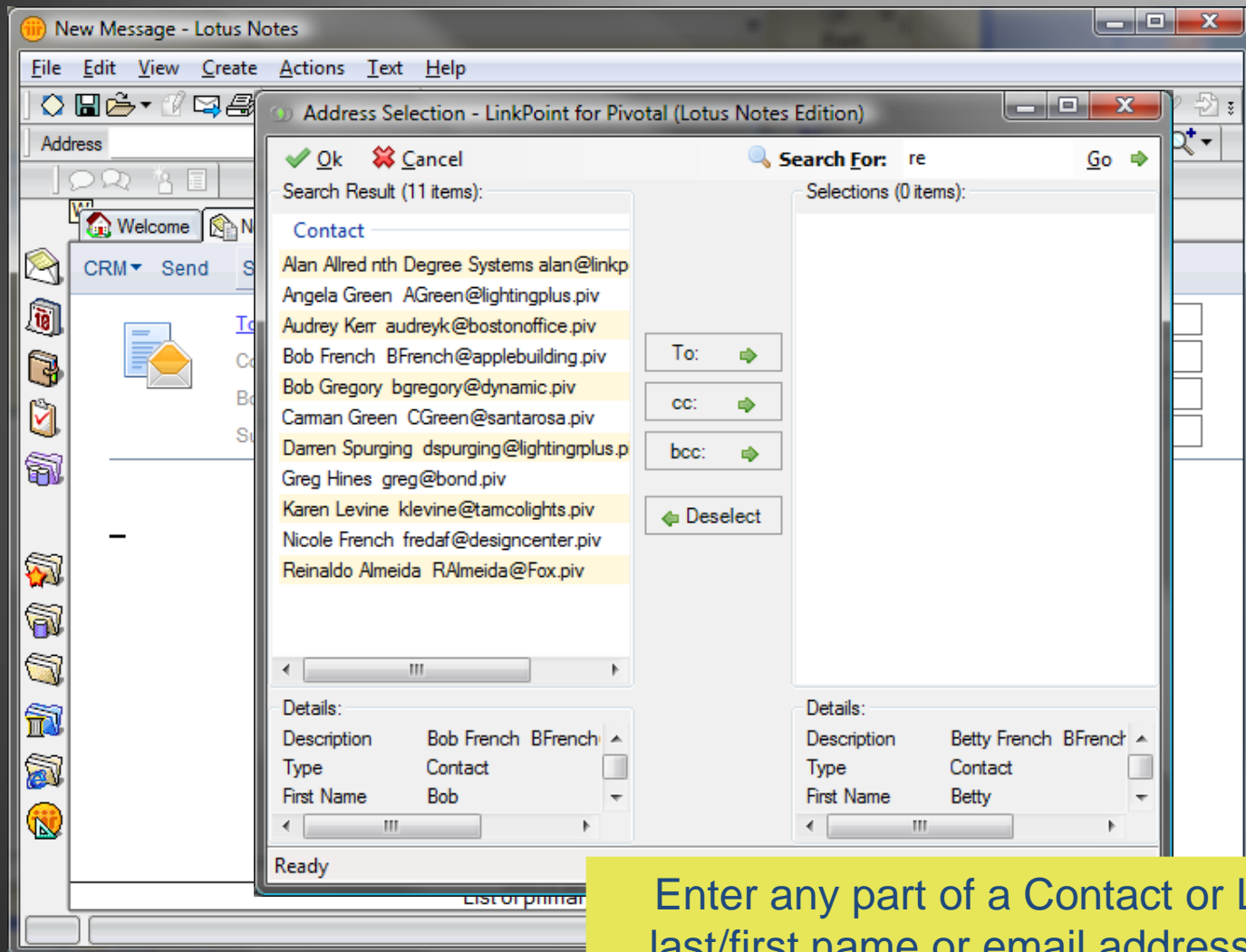
This allows you to link your Email, Calendar or Task item to any item in Pivotal based on the Pivotal Rules. You have the ability to edit and select links.

Step 2

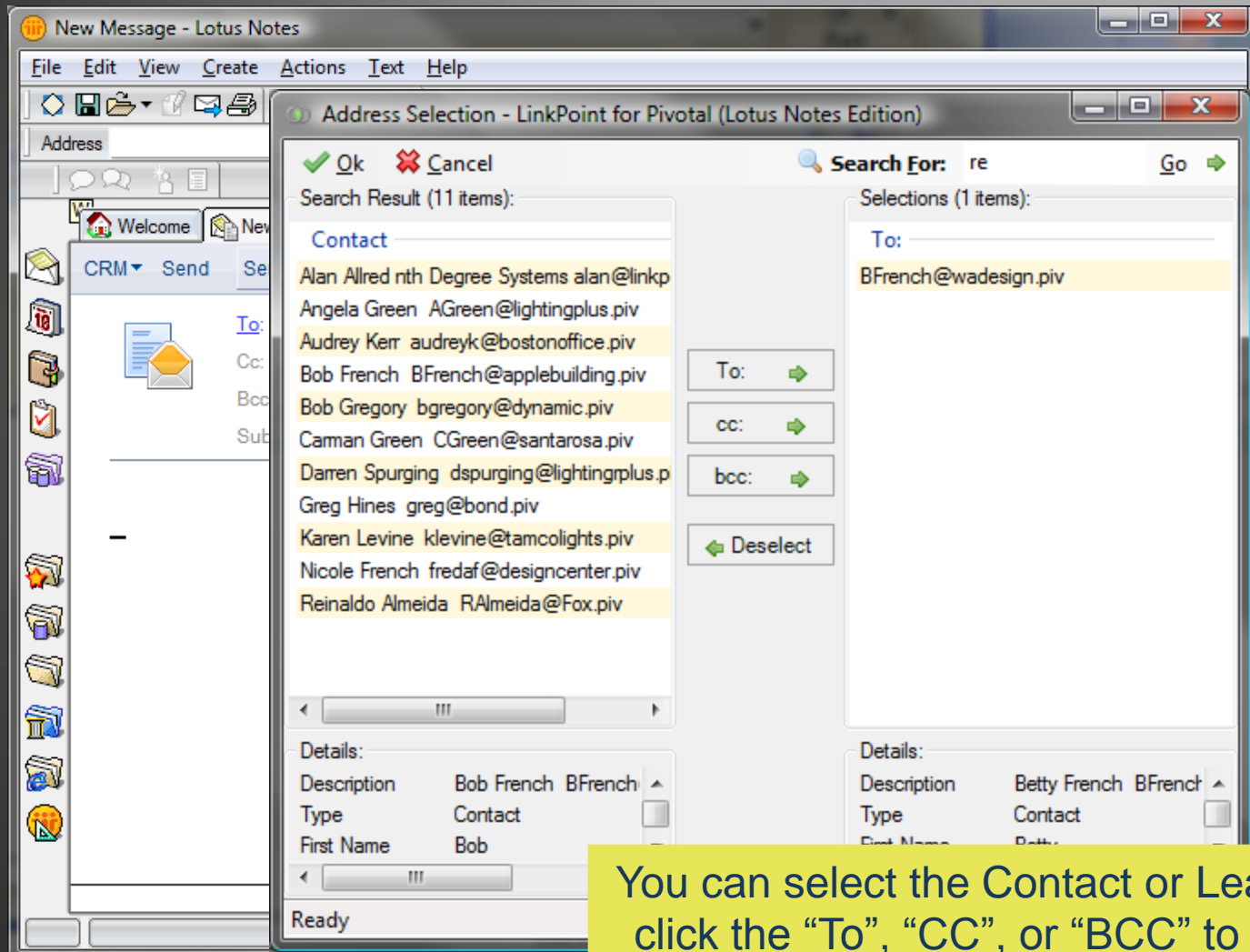
How to use the LinkPoint CRM Address book to add recipients to an Email or Calendar Meeting invitation.



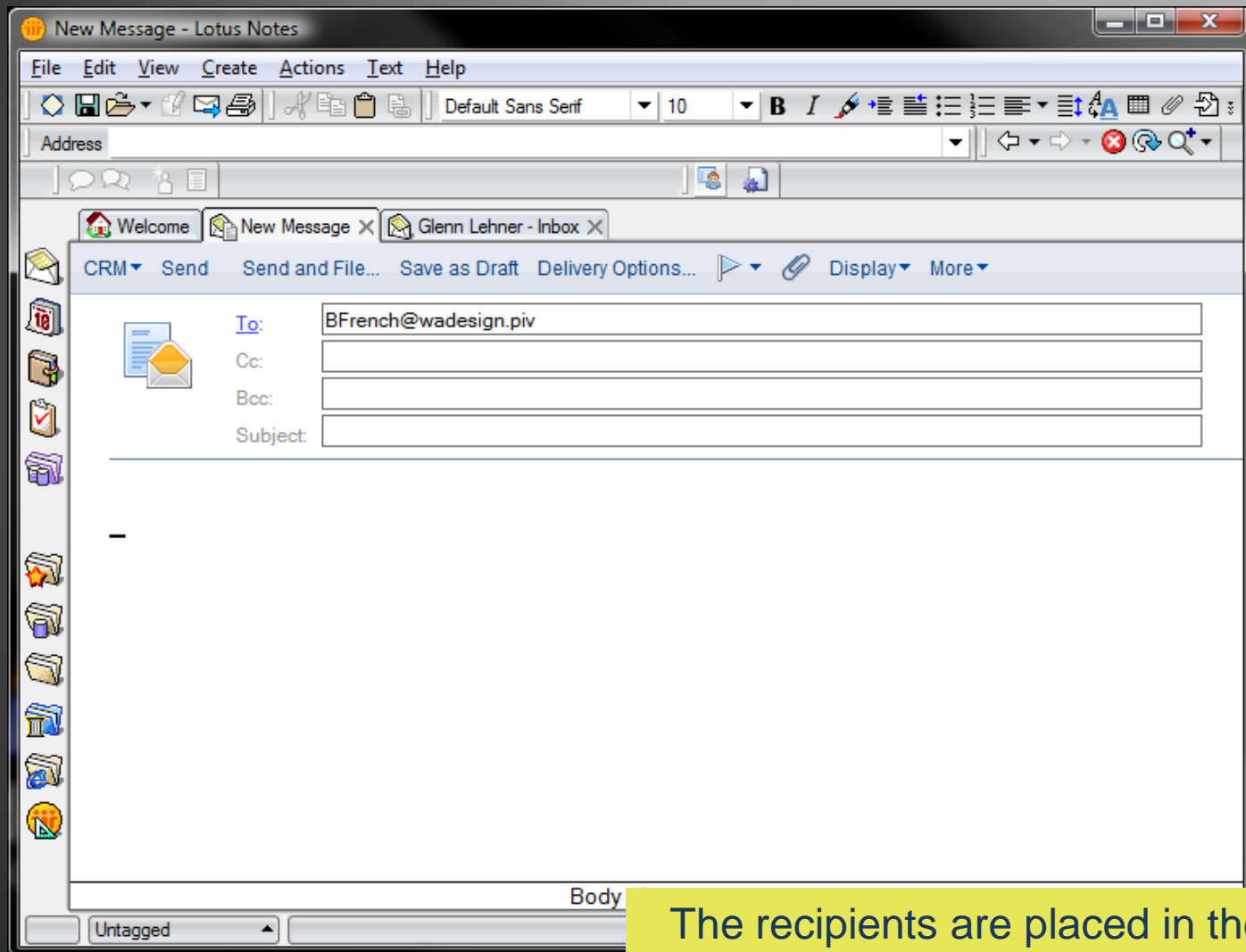
When composing a new email or Meeting Invitation, you can address the email as you normally would or by using the LinkPoint Pivotal CRM Address book.



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



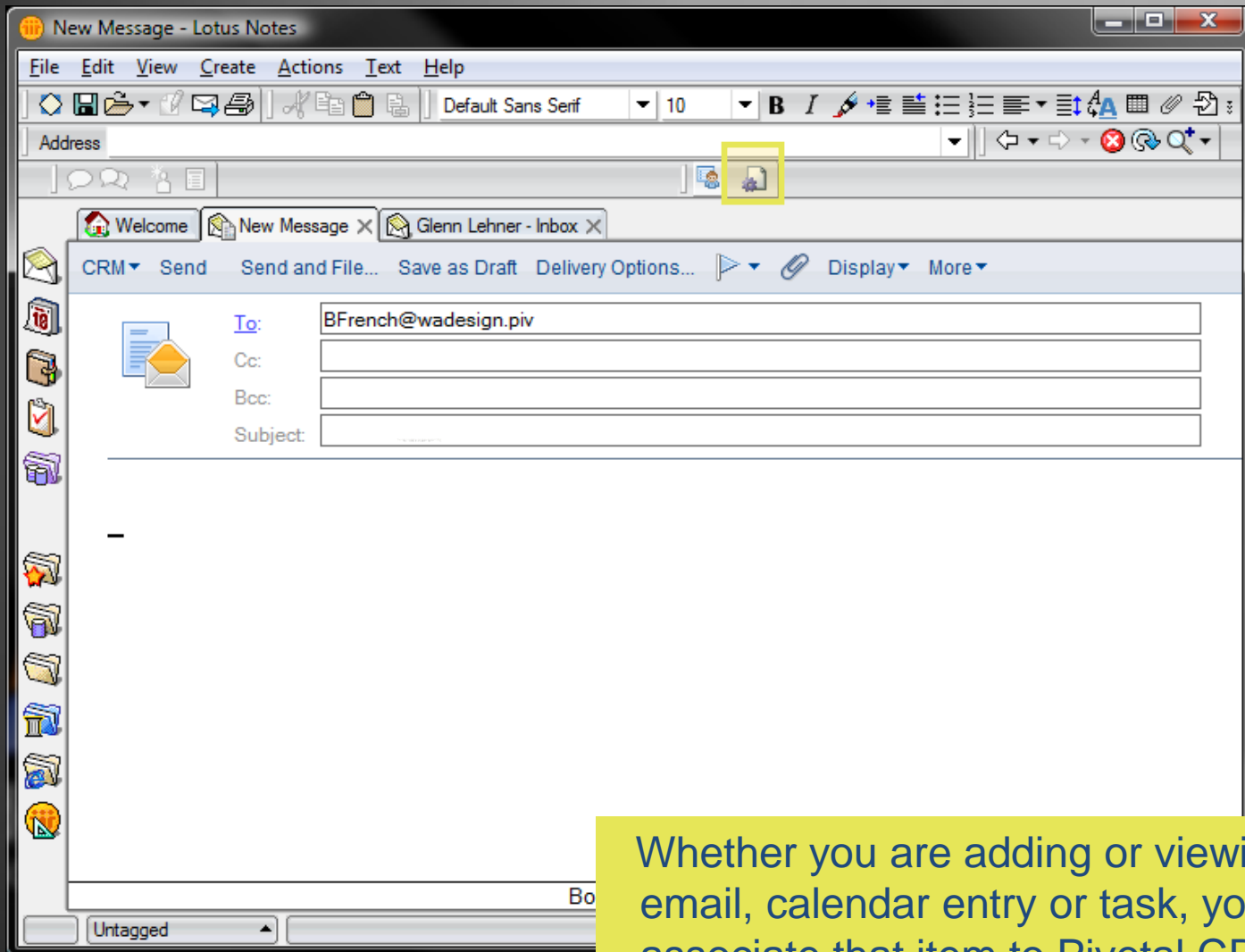
You can select the Contact or Lead and click the "To", "CC", or "BCC" to move the Contact or Lead to the recipient list. Click "Ok" to add selected recipients to your email or meeting invitation.



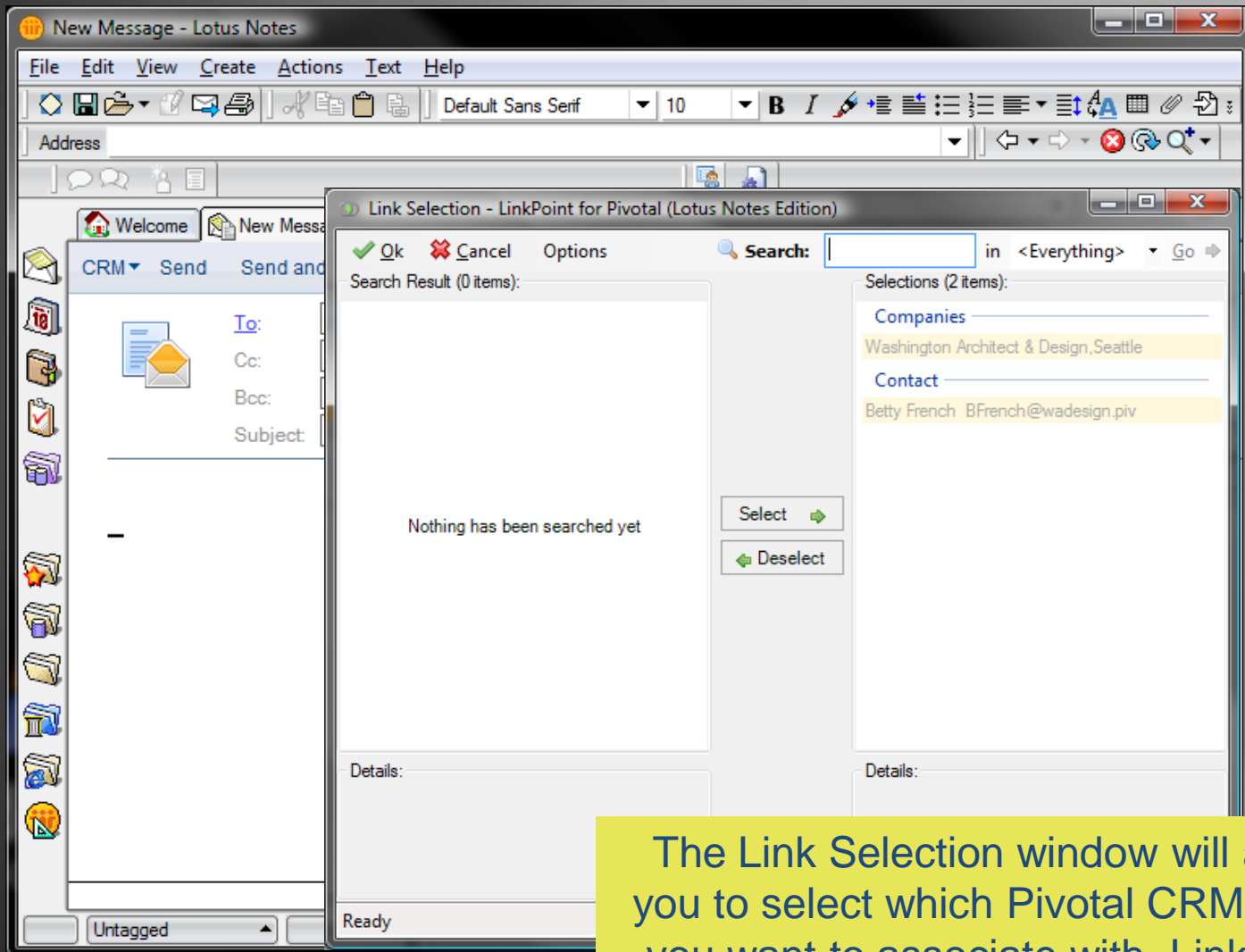
The recipients are placed in the appropriate fields and you can complete your email or meeting invitation.

Step 3

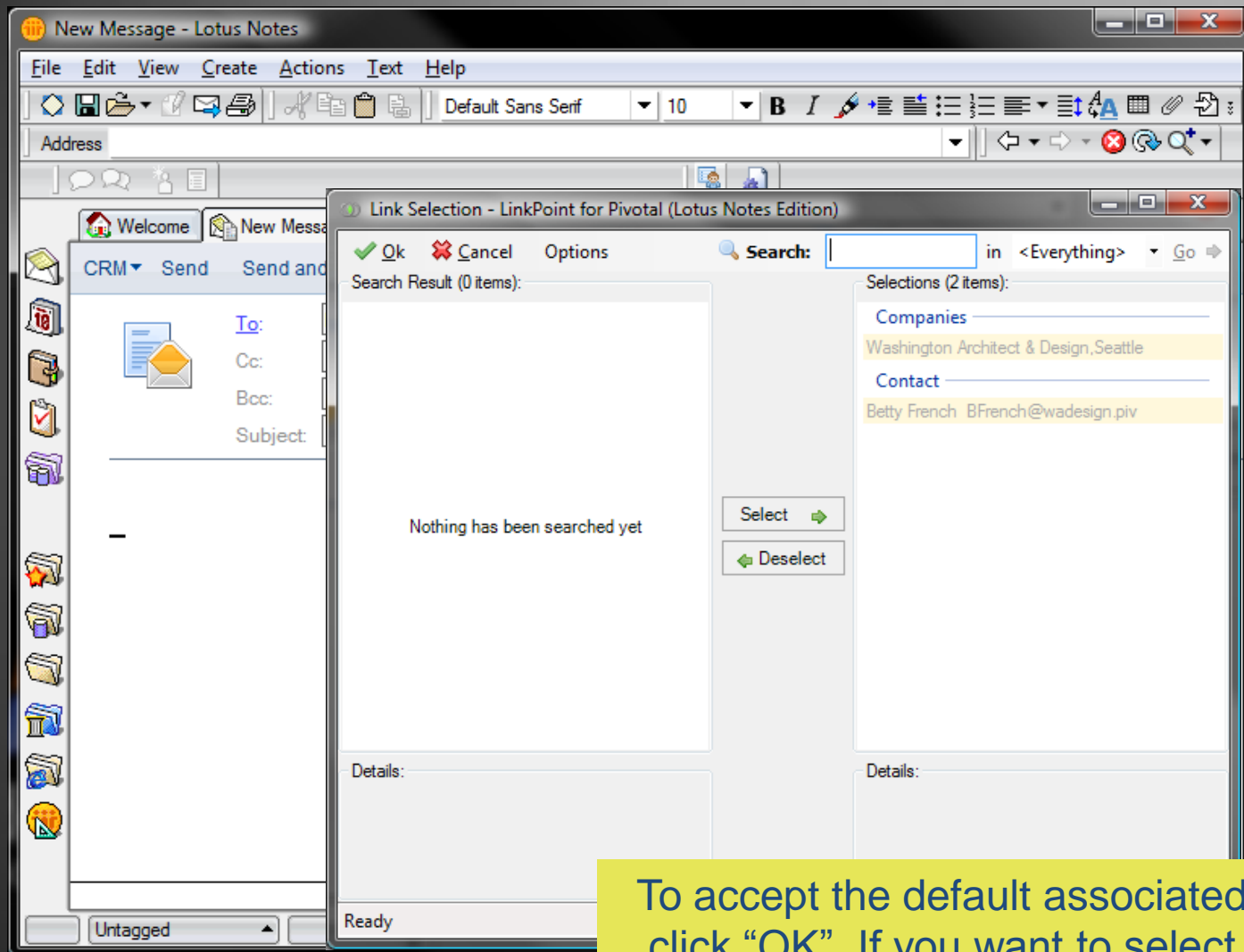
How to Associate an Email, Calendar Entry or Task to Pivotal CRM.



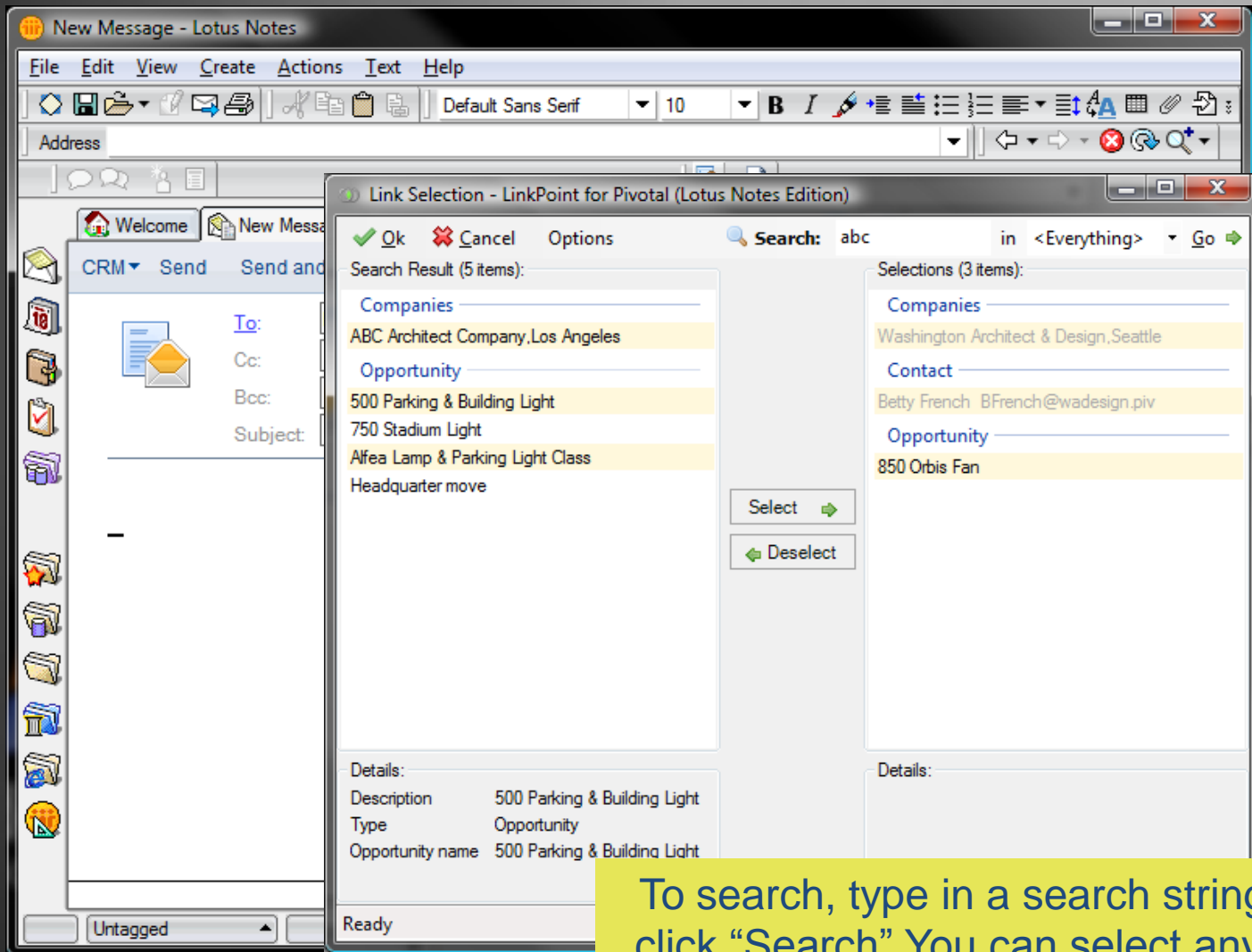
Whether you are adding or viewing an email, calendar entry or task, you can associate that item to Pivotal CRM by clicking on the “Associate Links” toolbar button.



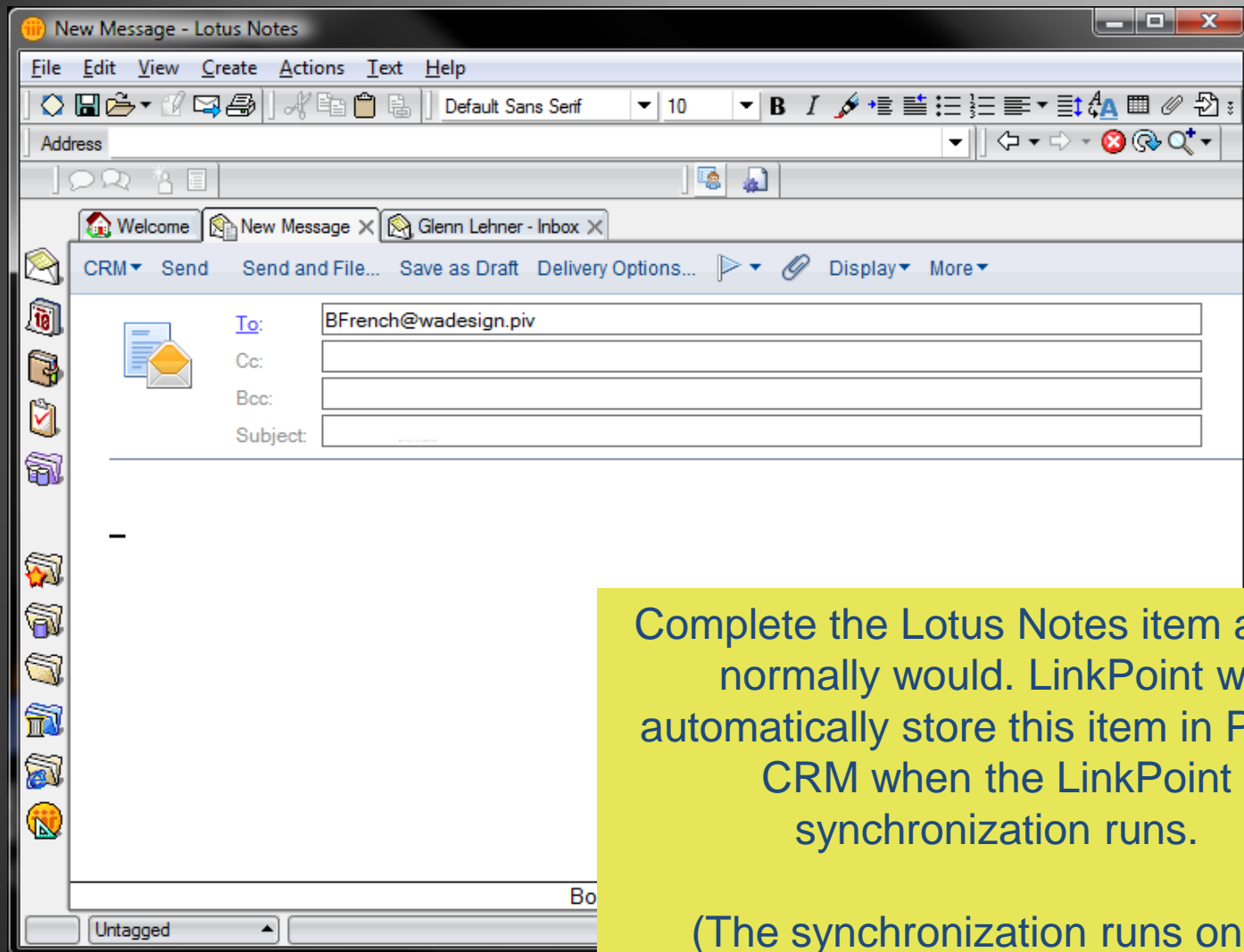
The Link Selection window will allow you to select which Pivotal CRM items you want to associate with. LinkPoint will default the contacts, leads or companies selections based on the recipients of the Lotus Notes item.



To accept the default associated links, click "OK". If you want to select other Pivotal entries to associate with, you can search for any item within Pivotal.

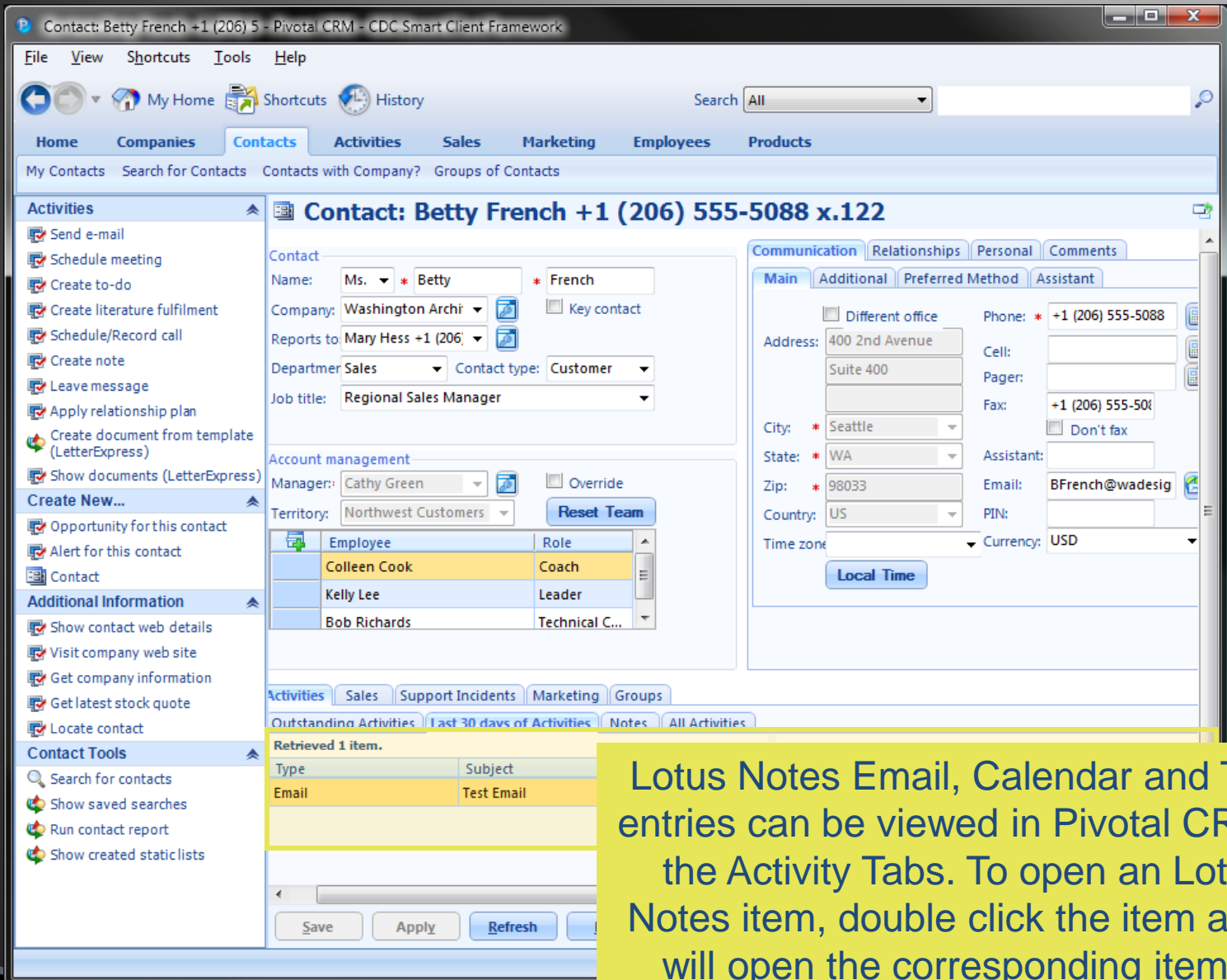


To search, type in a search string and click "Search" You can select any item or items to associate with by selecting the item and clicking "Select". Click "Ok" once completed.



Complete the Lotus Notes item as you normally would. LinkPoint will automatically store this item in Pivotal CRM when the LinkPoint synchronization runs.

(The synchronization runs on an schedule and therefore there may be a delay before you can your Lotus Notes item in Pivotal CRM.)



Lotus Notes Email, Calendar and Task entries can be viewed in Pivotal CRM in the Activity Tabs. To open an Lotus Notes item, double click the item and it will open the corresponding item in Lotus Notes.

Contact Information

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

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