

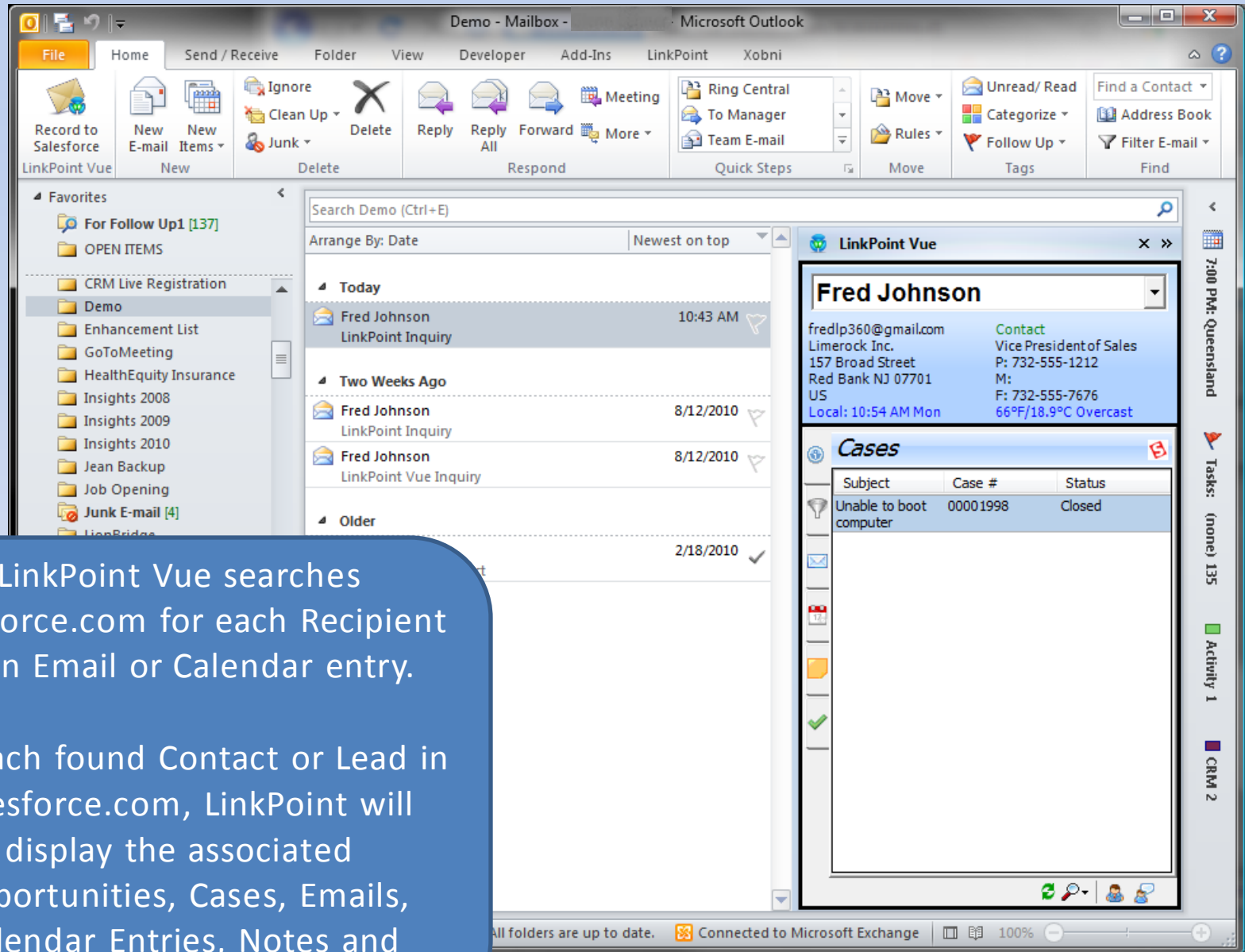
LinkPoint Vue

The Salesforce CRM Adoption and
Productivity Accelerator

Learning Series

General Overview

General Overview



LinkPoint Vue searches Salesforce.com for each Recipient of an Email or Calendar entry.

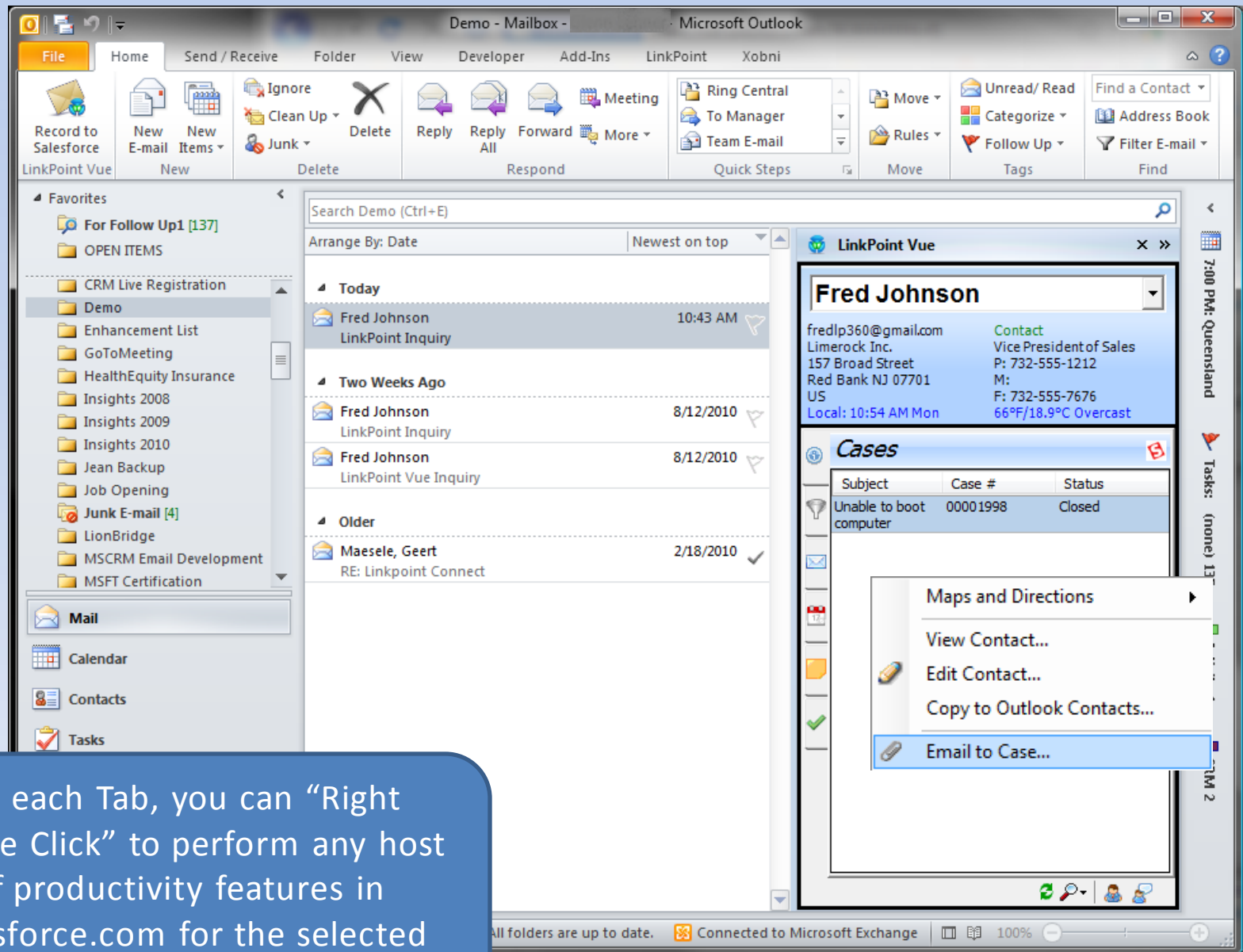
For each found Contact or Lead in Salesforce.com, LinkPoint will display the associated Opportunities, Cases, Emails, Calendar Entries, Notes and Tasks.

The screenshot shows the Microsoft Outlook interface with the 'LinkPoint Vue' add-in. The main window displays a list of emails in the 'Demo' folder. The selected email is from Fred Johnson, dated 10:43 AM, with the subject 'LinkPoint Inquiry'. The contact card for Fred Johnson is visible on the right, showing his email address (fredlp360@gmail.com), phone numbers, and address. Below the contact card, a 'Cases' tab is active, displaying a table with the following data:

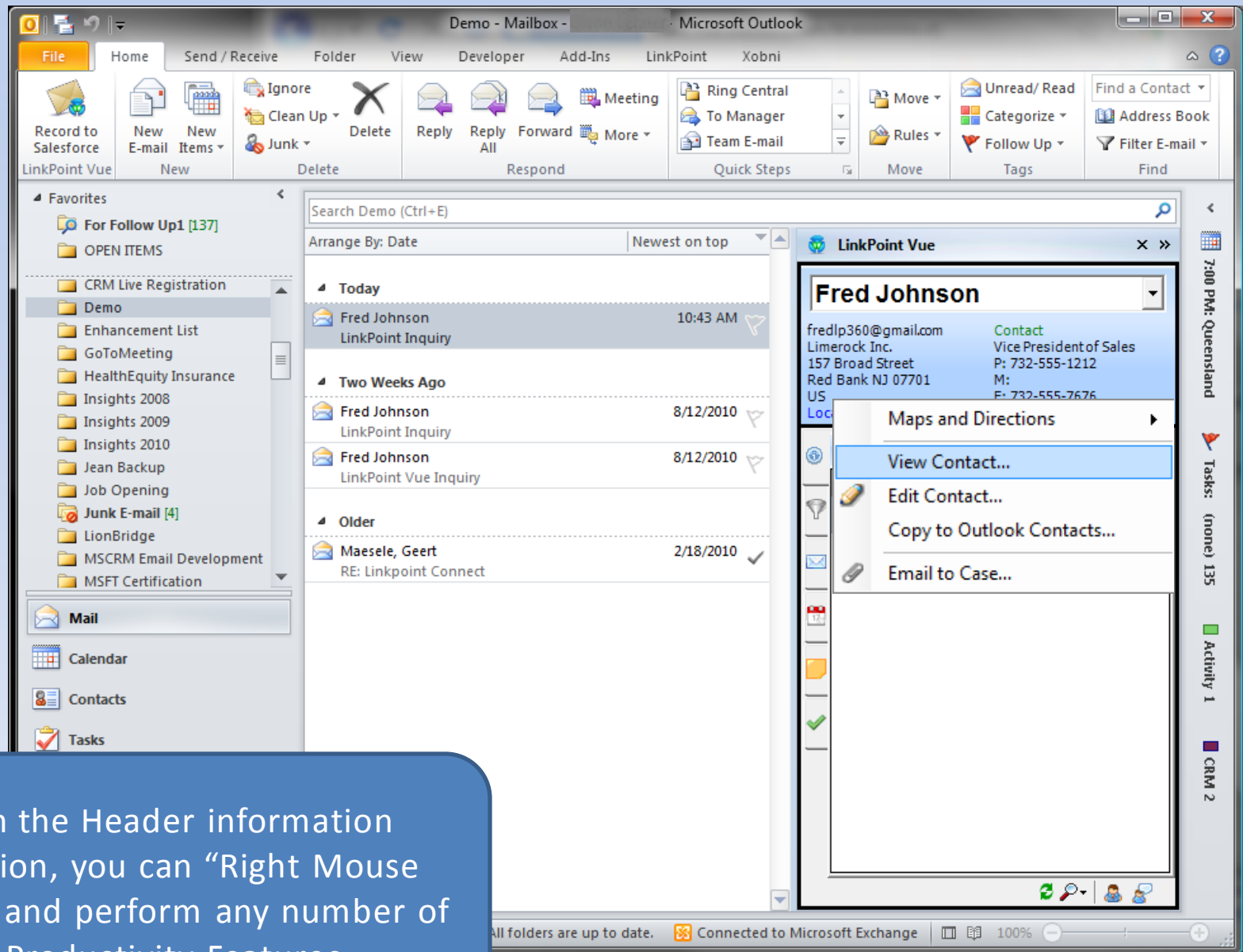
Subject	Case #	Status
Unable to boot computer	00001998	Closed

A blue box highlights the 'Cases' tab in the contact card's navigation pane, indicating that users can switch between different information sources for a selected contact or lead.

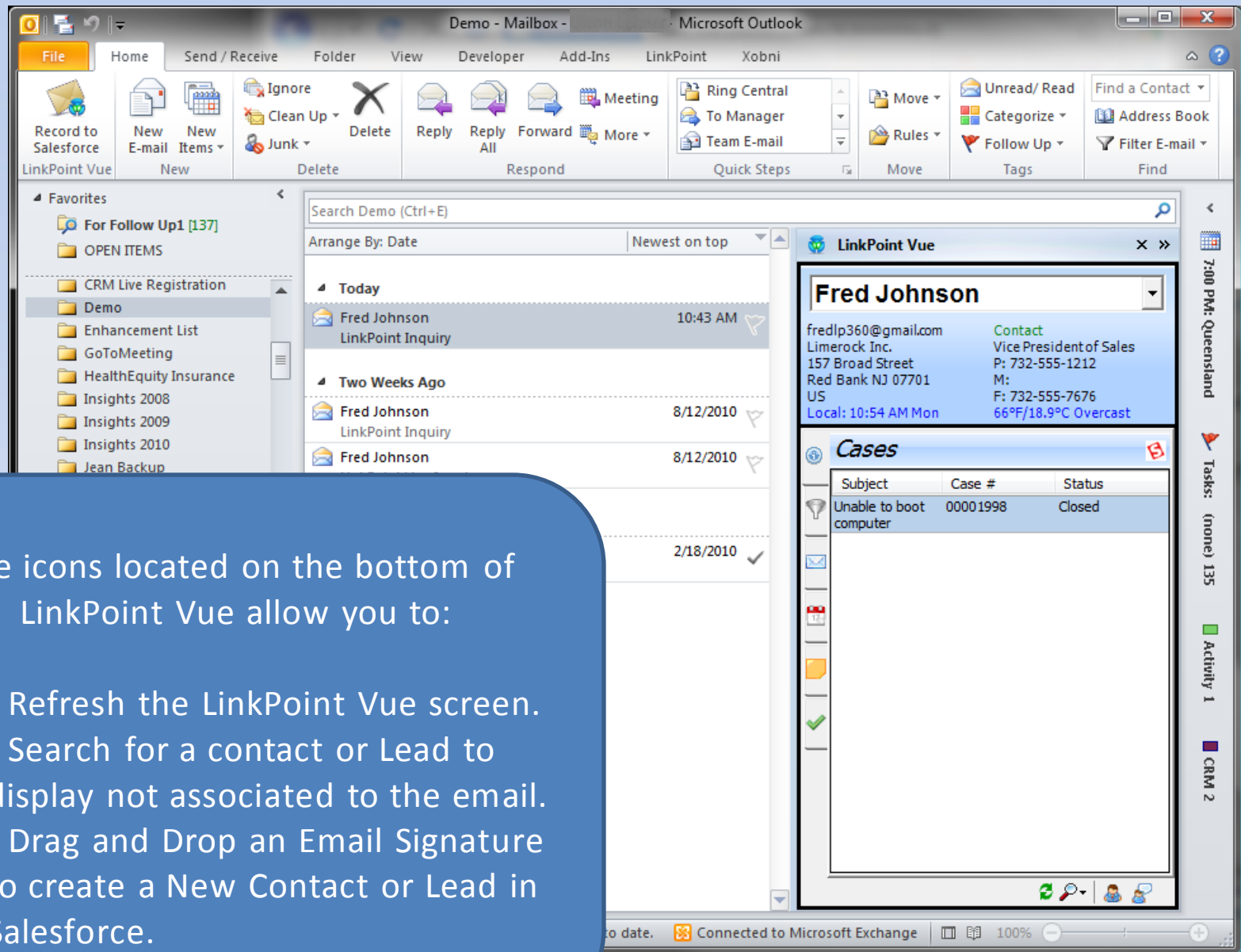
You can change Tabs to view the different information from Salesforce for the selected Contact or Lead.



On each Tab, you can “Right Mouse Click” to perform any host of productivity features in Salesforce.com for the selected item.



On the Header information section, you can “Right Mouse Click” and perform any number of Productivity Features.



The icons located on the bottom of LinkPoint Vue allow you to:

- Refresh the LinkPoint Vue screen.
- Search for a contact or Lead to display not associated to the email.
- Drag and Drop an Email Signature to create a New Contact or Lead in Salesforce.



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