

LinkPoint ***(Lotus Notes Edition)***

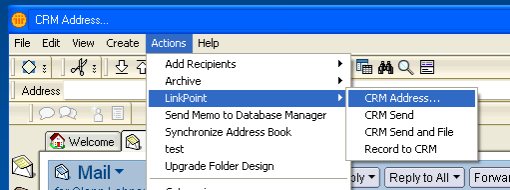
Custom Mail Template Overview



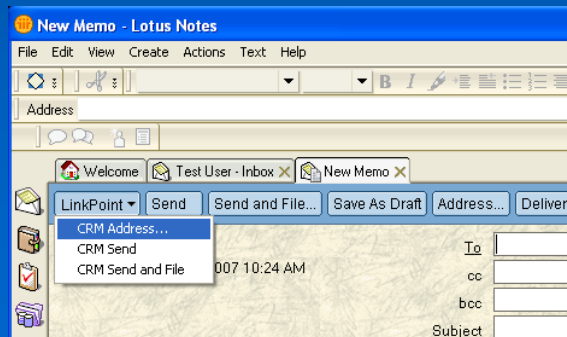
Overview

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

- Menu items located in the Lotus Notes Action Menu.



- Button menu's located on the Memo, Reply and Reply with History Forms.



Action Menu's (Local Agents)

- At the completion of the LinkPoint software, the installation program will open our Lotus Notes database. The user will be prompted to install the LinkPoint into their Lotus Notes.
- Four scripts are installed as local agents into the users mail database.
 - CRM Address
 - Allows the user to use the CRM system as an address book.
 - CRM Send
 - Sends the email and record the email to the CRM system.
 - CRM Send and File
 - Send and File the email and record the email to the CRM system.
 - Record To CRM
 - Record an inbound or previously sent email to the CRM system.
- 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 (Action Scripts)

- For support, distribution, and upgrade purposes, LinkPoint360 recommends that a custom Mail Template be used for the users of the LinkPoint software. We provide a Lotus Notes database “LinkPointSetup.NSF” file that contains the LinkPoint scripts and agents.
- Four action scripts are required to be added to the Memo, Reply and Reply with History forms.
 - CRM Address
 - Allows the user to use the CRM system as an address book.
 - CRM Send
 - Sends the email and record the email to the CRM system.
 - CRM Send and File
 - Send and File the email and record the email to the CRM system.
 - Record To CRM
 - Record an inbound or previously sent email to the CRM system.
- LinkPoint does not provide any forms, just action scripts to be added to the forms.

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