

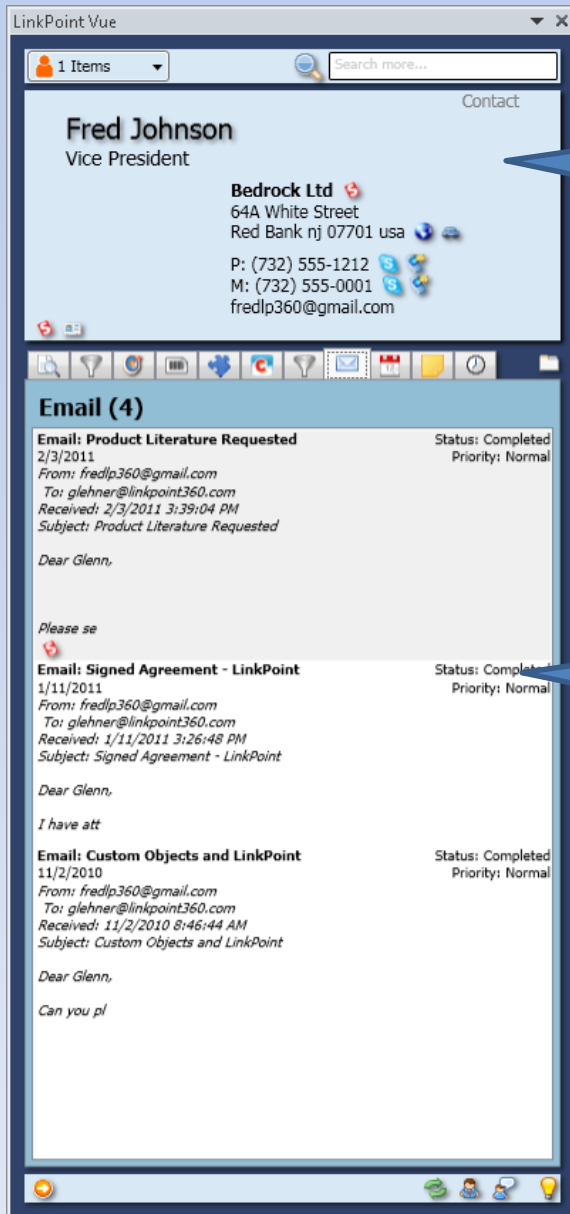
LinkPoint Connect

The Salesforce CRM Adoption and
Productivity Accelerator

Learning Series

Quick Start Guide

Vue Pane Overview



The header area displays the contact or lead information based on the email address found on the currently selected email, calendar, contact or task item in outlook.

The content area displays the Salesforce content associated with the contact or lead. This is information such as emails, opportunities, cases, etc.

Header Pane

If the entry in Outlook has multiple recipients, you can page through each Contact or Lead record.

You can manually search for a Contact or Lead.

The screenshot shows a web browser window titled "LinkPoint VU". At the top left, there is a dropdown menu with "1 Items" and a person icon. To the right is a search bar with the text "Search more...". Below this is a contact card for "Fred Johnson", Vice President. The card includes the company name "Bedrock Ltd" with a red 'S' icon, the address "64A White Street, Red Bank nj 07701 usa" with globe and location icons, and phone numbers "P: (732) 555-1212" and "M: (732) 555-0001" with 'S' and 'M' icons. The email address "fredlp360@gmail.com" is at the bottom with a red 'S' icon. The word "Contact" is written in the top right corner of the card area.

This informs you of what type of record this individual is. It may be a Contact or Lead or if we can not find an associated contact or lead in Salesforce, LinkPoint may display the lead from Jigsaw.

LinkPoint provides icons that you can click to perform productivity features; such as open the contact in Salesforce, map in Google. Hover over an icon for a tool-tip description.

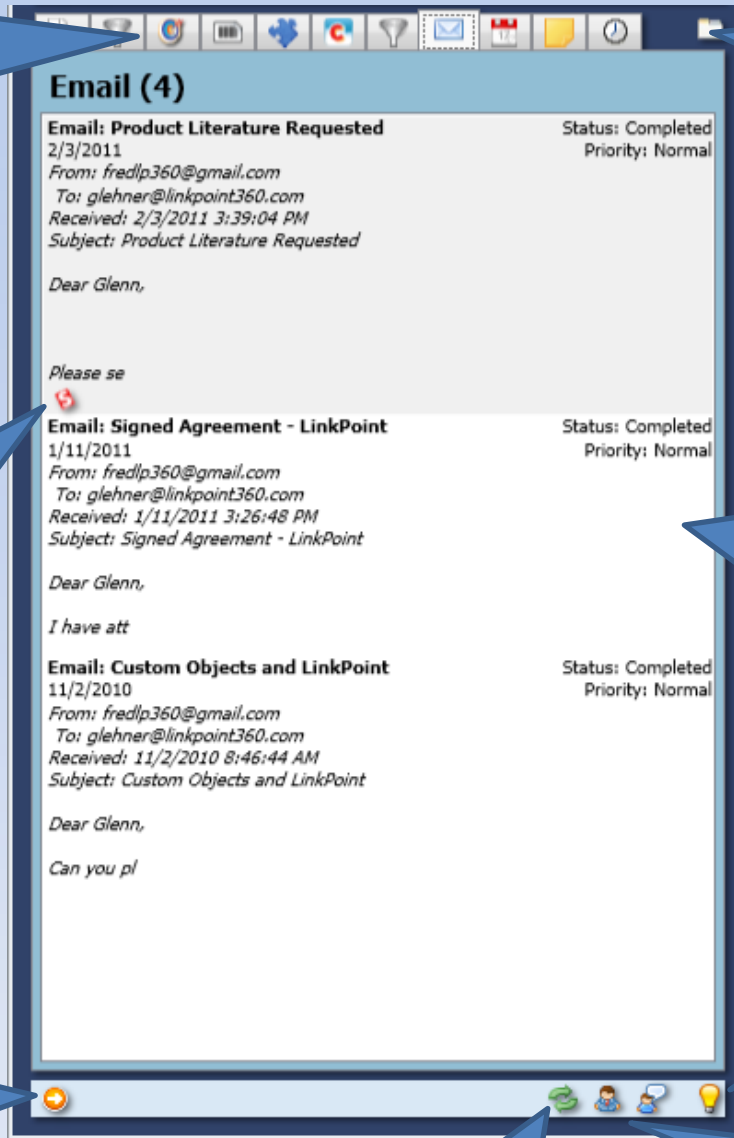
Content Pane

Each tab displays Salesforce information related to the Contact or Lead.

The Open in Salesforce icon allows you to open any record directly in Salesforce.

This will minimize the Vue Pane.

This will refresh the Vue Data.



Click this tab selector to show or hide tabs you are interested in.

Double click any record for a "Quick Vue" of all the information on the record without having to open Salesforce.

Click the light bulb to send us quick and easy suggestions about our software

Drag and Drop an Email Signature to Create a new Contact or Lead.

Quick Vue Window

The screenshot shows a 'Quick View' window titled 'Email'. The window has a title bar with a close button (red X) and a scroll bar. The content is organized into a list of fields and their values, followed by a text body and a pagination indicator.

Subject	Email: Hello World w/attachment
Activity Date	3/19/2010
Status	Completed
Priority	Normal
Is Closed	Yes
Description	From: nart@yahoo.com To: alan@linkpoint360.com cc: richard@linkpoint360.com bcc: Received: 3/19/2010 11:18:00 AM Subject: Hello World w/attachment

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean dictum auctor tortor sit amet aliquet.

1 of 3 ▶

You can close the Quick View window by mouse clicking off the window or clicking the Close Icon.

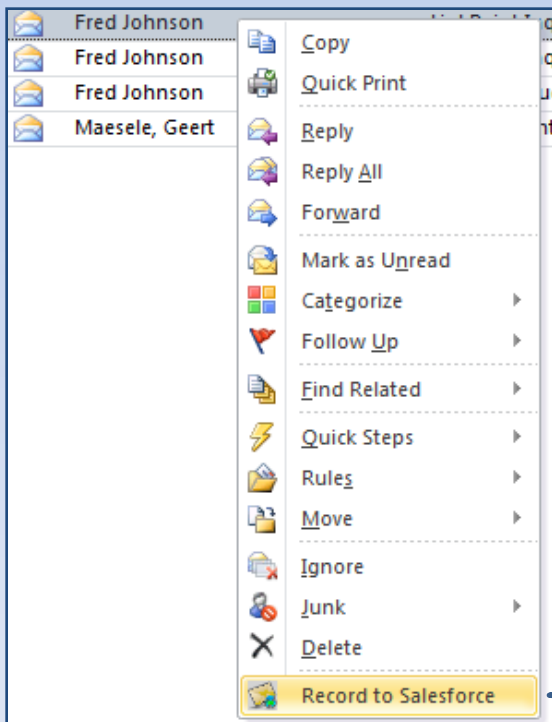
The content displayed is based on the record type you are viewing.

If there were multiple records, you can page forward and back between them.

How To Record an Inbound Email



You can click on the "Record to Salesforce" button.



You can use the Right Mouse Click Context Menu

If a contact, lead or any other item is not automatically found to record the email to, you can search Salesforce and select it.

Record - LinkPoint for Salesforce

Record Now Cancel

Search: (0 items) Go

Record/Link To:

Email Parties

- Fred Johnson Bedrock Ltd
 - Broken Mouse
 - CRM Password incorrect
 - XP not booting
 - LinkPoint Connect

Options:

Follow Up Attachments

Create a follow up task?

Due Date: 11/10/2010

Subject: Follow up: LinkPoint Inquiry

Reference: Broken Mouse (case)

Comment:

Ready

Based on the recipients of the email, LinkPoint will display the email parties and any associated records such as Opportunities and Cases.

You can specify which attachments you would like to save back into Salesforce.

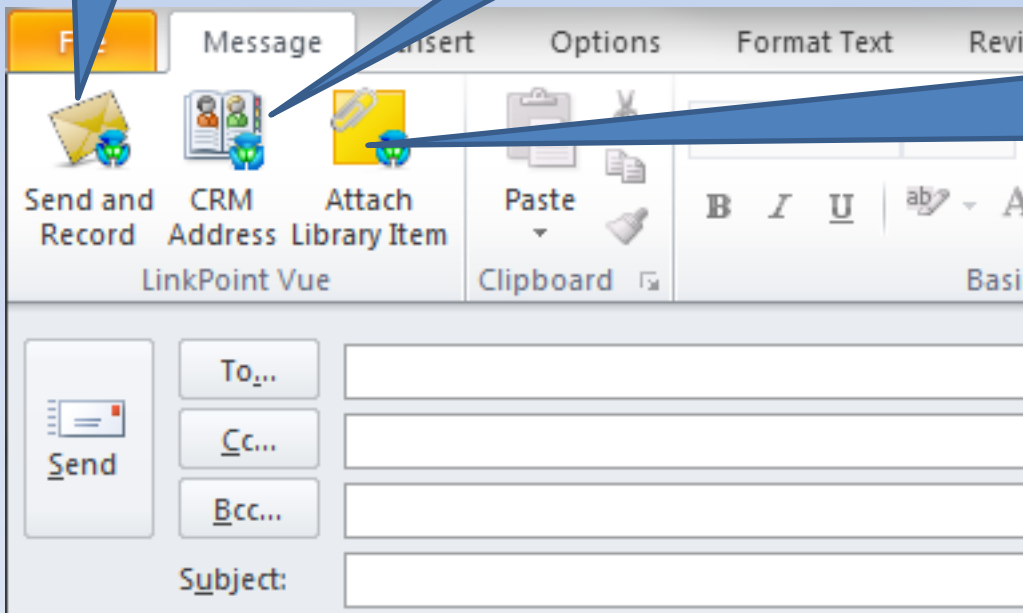
Along with the email, you can also create a "follow up task" to remind you to act on something later on.

How To Compose and Record an Outbound Email

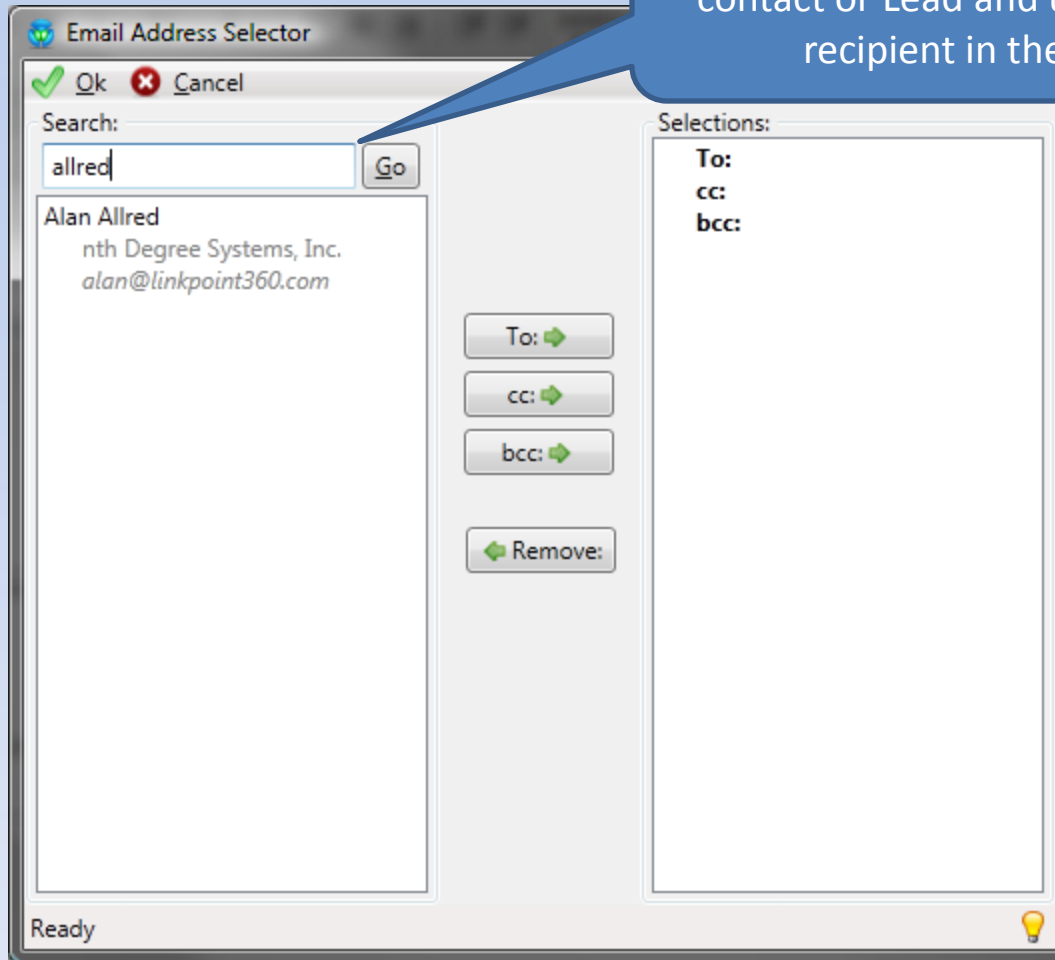
Send the email *and* record it back to Salesforce.

Use salesforce.com as an address book and choose email address for the email.

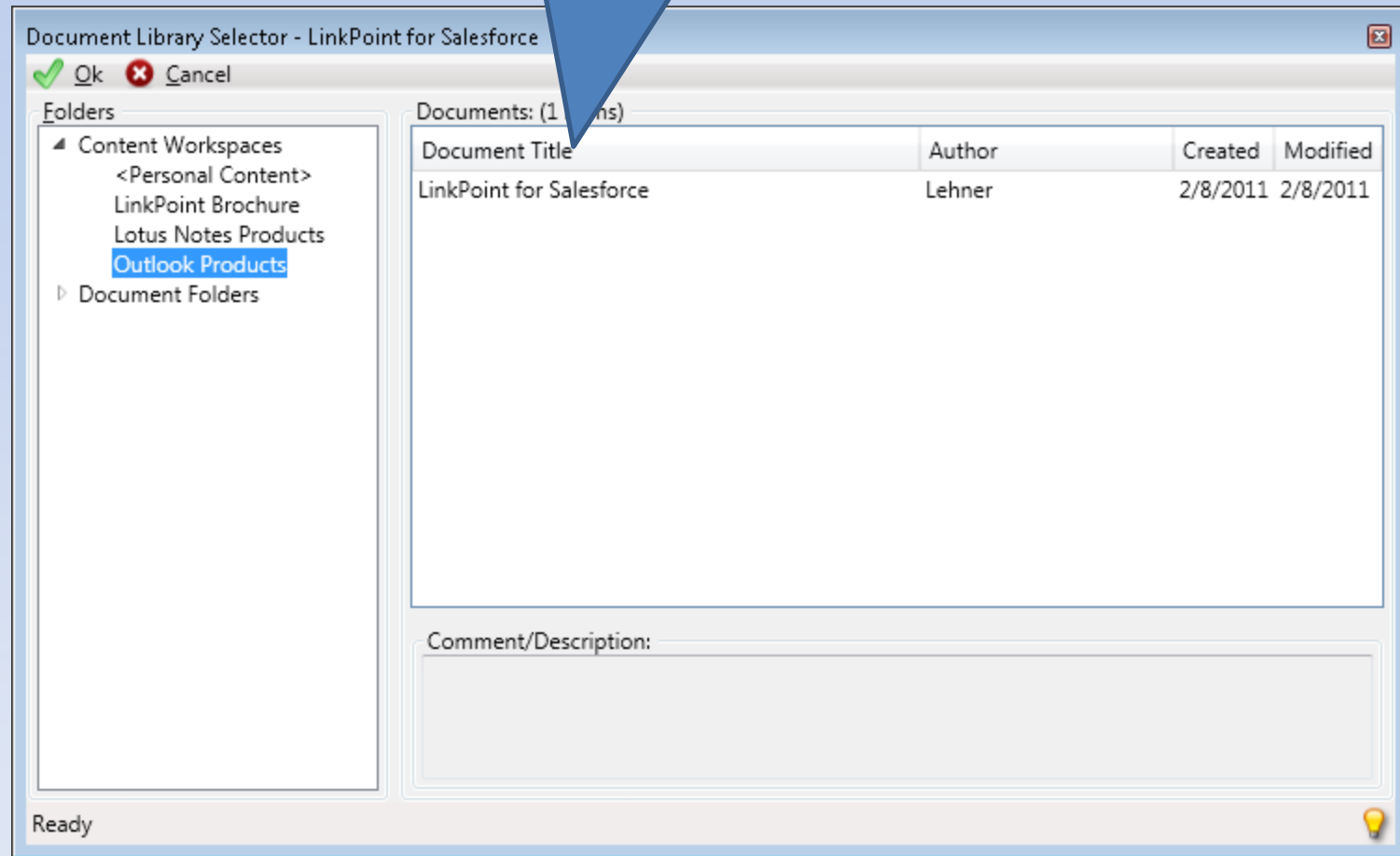
Attach documents from your Salesforce.com Document Library or Content Management System.



You can search Salesforce for any contact or Lead and use them as a recipient in the email.



You can select any document from the Salesforce Document Library and add it as an Attachment on your email.

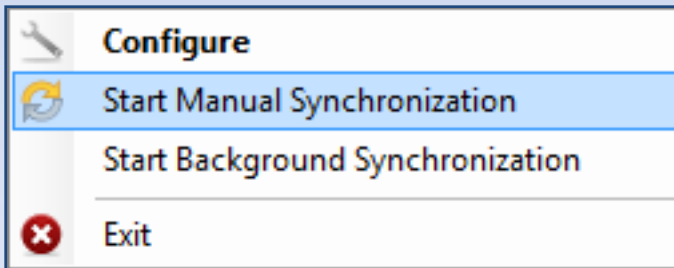


How To Synchronize Calendars, Contacts, And Tasks

LinkPoint Assist runs in the system tray. It will can automatically run the synchronize process in the background or you can Right Mouse Click and Manually Synchronize.

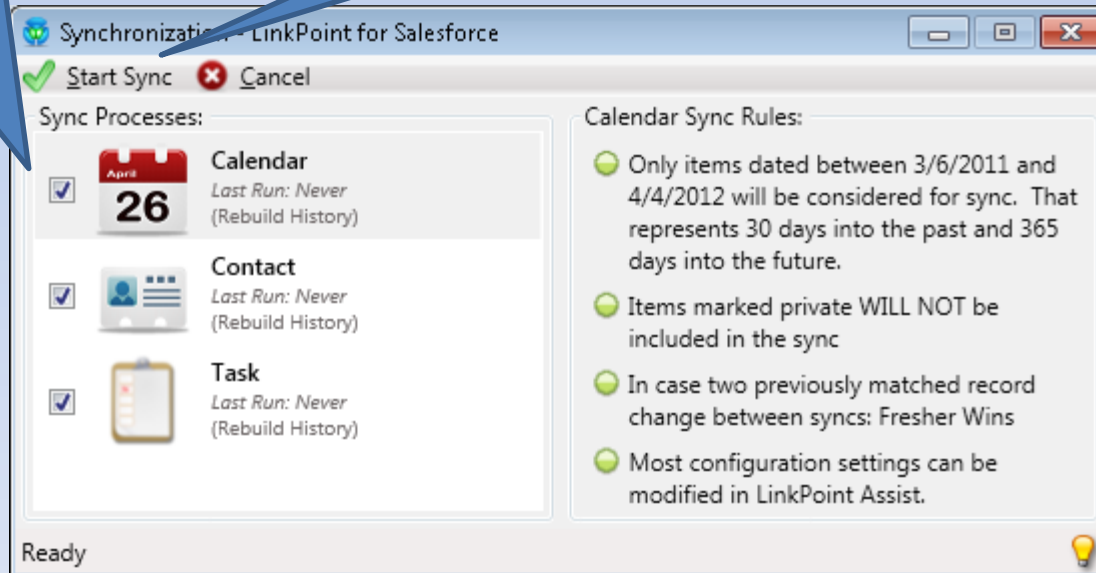


The Right Mouse Click menu allows you to Configure LinkPoint or Start a Manual or Background Synchronization.



Check any items that you want synchronized to Outlook.

To start the manual synchronization, click Start Sync.

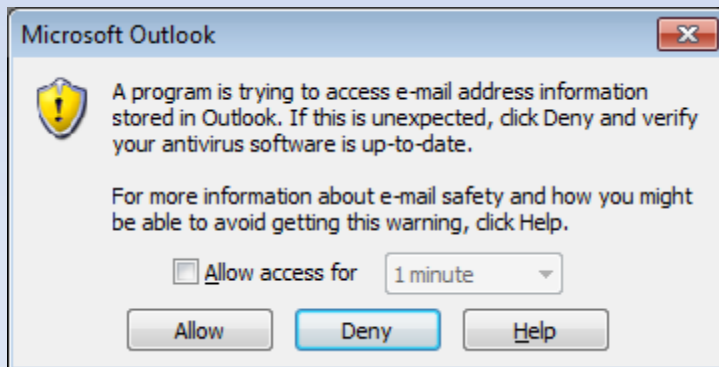


If you receive this Microsoft Outlook Message, you will need update your antivirus software.

This is a mechanism of Outlook that helps ensure that only trust external applications can access any Outlook object with an email address.

Microsoft provides a free Antivirus software called Microsoft Security Essentials.

It can be downloaded from the following link:
http://www.microsoft.com/security_essentials/



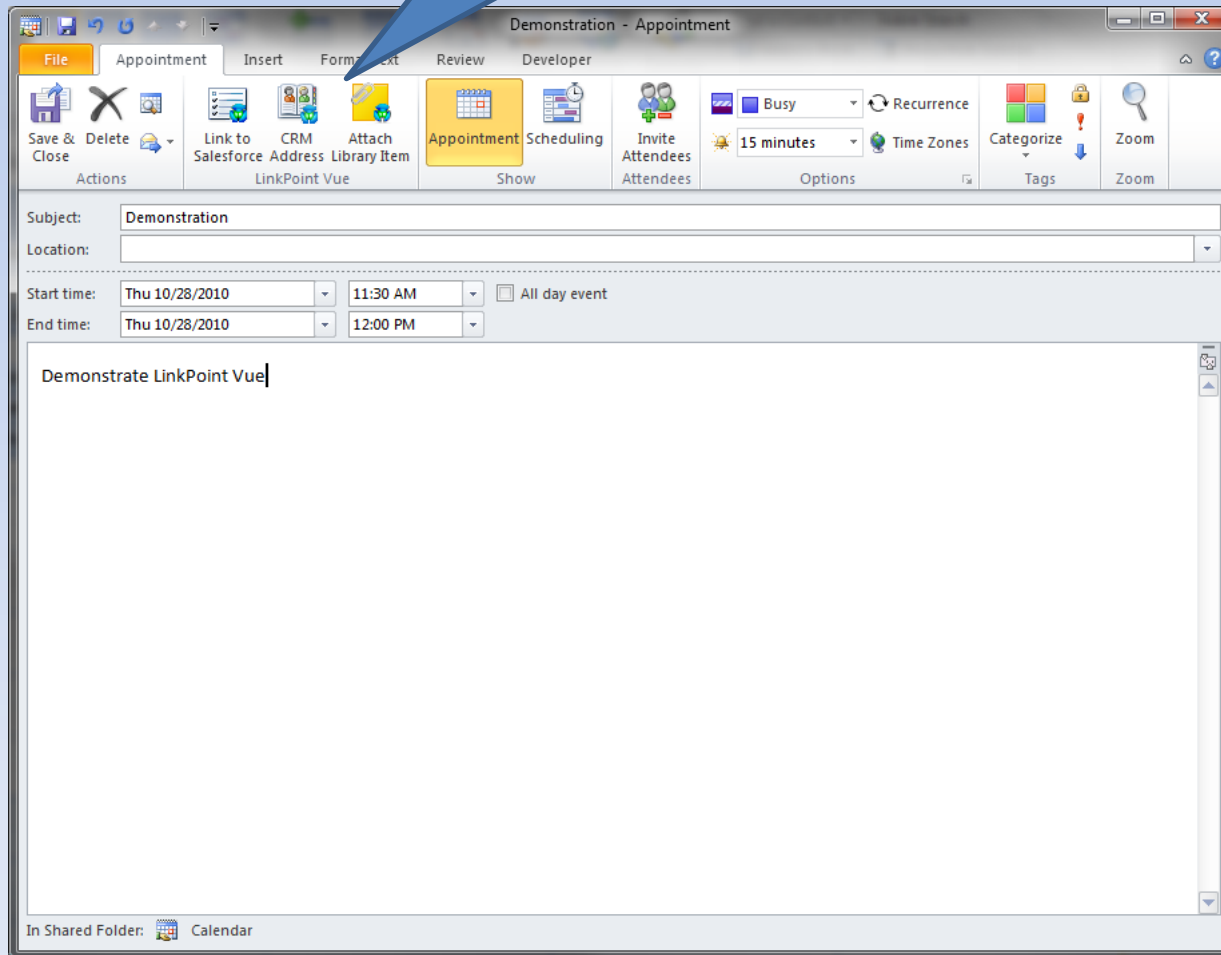
The Synchronization Summary screen is only displayed if you run a manual synchronization.

The data is a summary of which records need to be synchronized and in which direction.

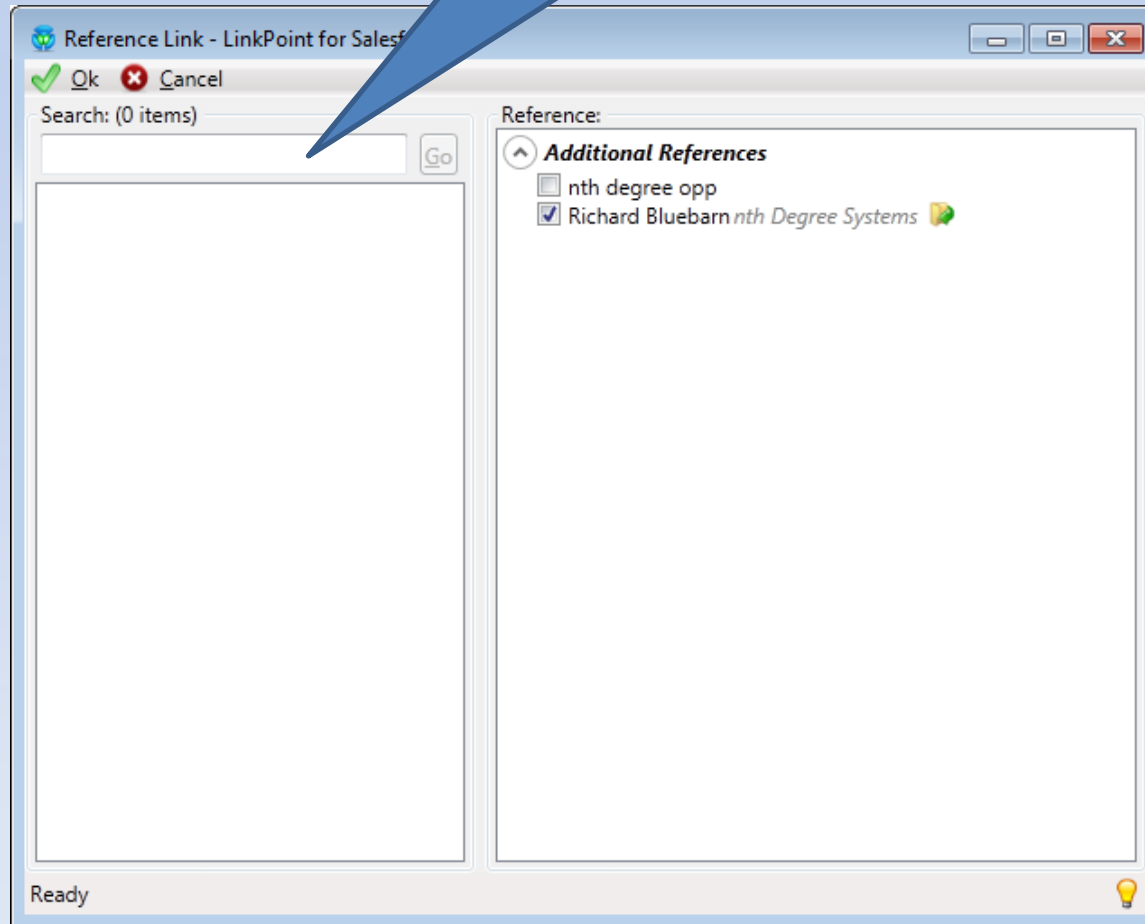
This will appear for Calendars, Contacts and Tasks.

Salesforce			Microsoft Outlook	
Subject	Start Date Time	Action	Subject	Start Date Time
My Sample Daily meetin	11/3/2011 8:00:00 AM	↔	My Sample Daily meetin	11/3/2011 8:00:00 AM
ACME contracts signing	10/29/2010 10:00:00 AM	➡		
Resume Reviews are due	10/28/2010 8:30:00 AM	➡		
Review Contracts for ACI	10/27/2010 3:00:00 PM	➡		
Lunch with Elaine	10/26/2010 1:00:00 PM	➡		
John Adamson	10/22/2010 2:30:00 PM	➡		
final test	11/4/2010 4:00:00 PM	➡		
LINKS TEST	11/4/2010 1:00:00 PM	➡		
test from sfdc	11/4/2010 1:00:00 PM	➡		
test	11/4/2010 11:30:00 AM	➡		
Just a simple event	11/9/2010 1:00:00 PM	➡		
z	11/5/2010 5:00:00 PM	➡		
WITH PERSON	11/4/2010 1:00:00 PM	➡		
my meeting	10/28/2010 11:00:00 AM	➡		
test from outlook	11/4/2010 1:00:00 PM	➡		

In Outlook, you can View, Add, Edit or Delete who and what this appointment is associated with in Salesforce.



You can select a Contact, Lead, Opportunity, Case or any other entity that an Appointment, Meeting or Task is associated to.





Sales: 732.212.8401
Sales@LinkPoint360.com

Support: 732.212.8403
Support@LinkPoint360.com

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