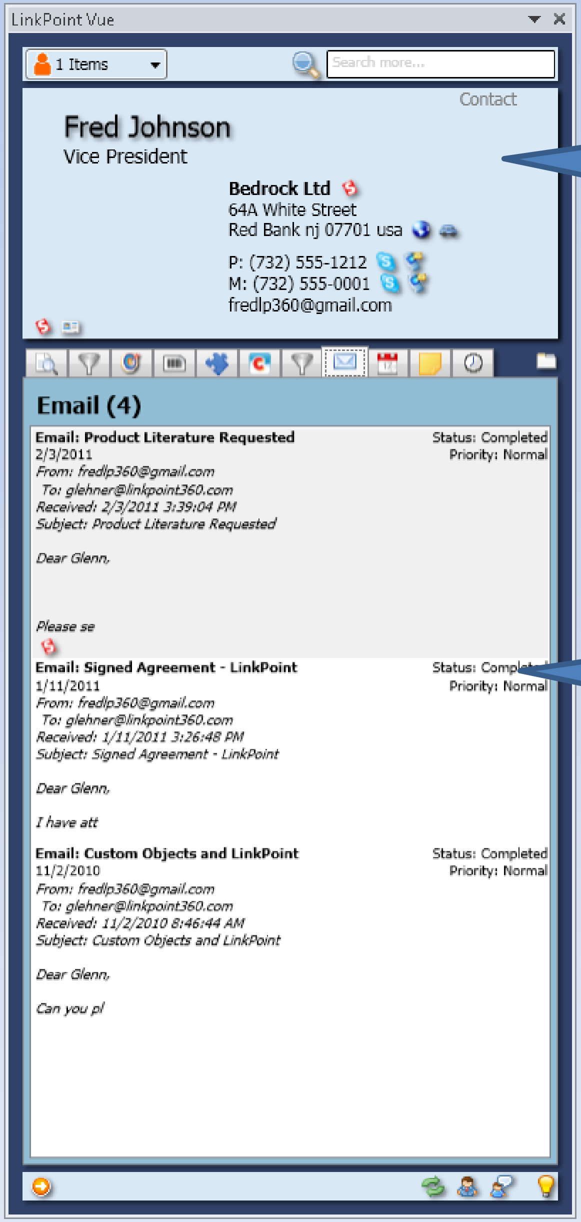
LinkPoint Connect

The Salesforce CRM Adoption and Productivity Accelerator

Learning Series

Quick Start Guide

Vue Pane Overview



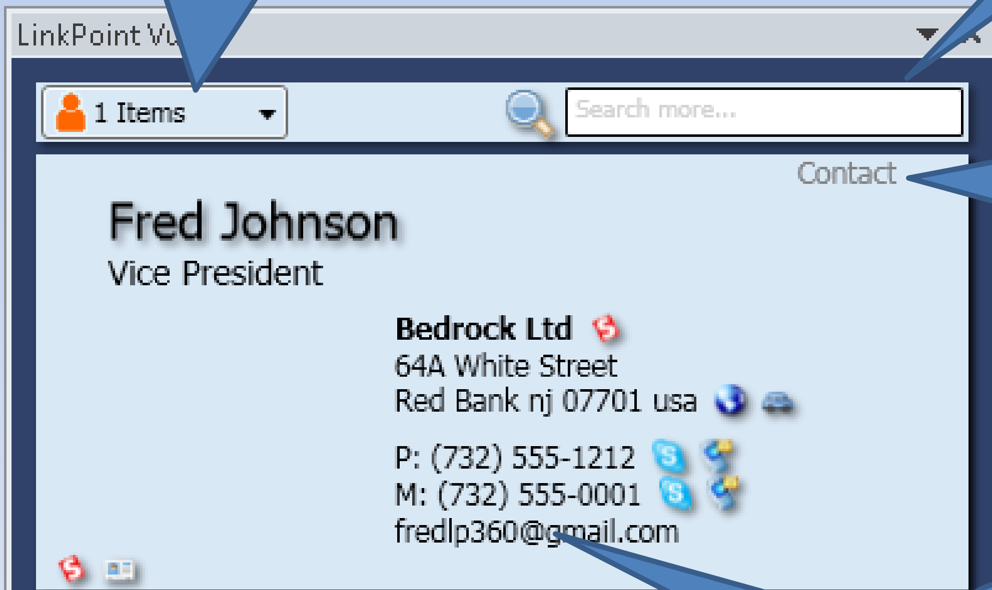
The header area displays the contact or lead information based on the email address found on the currently selected email, calendar, contact or task item in outlook.

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.



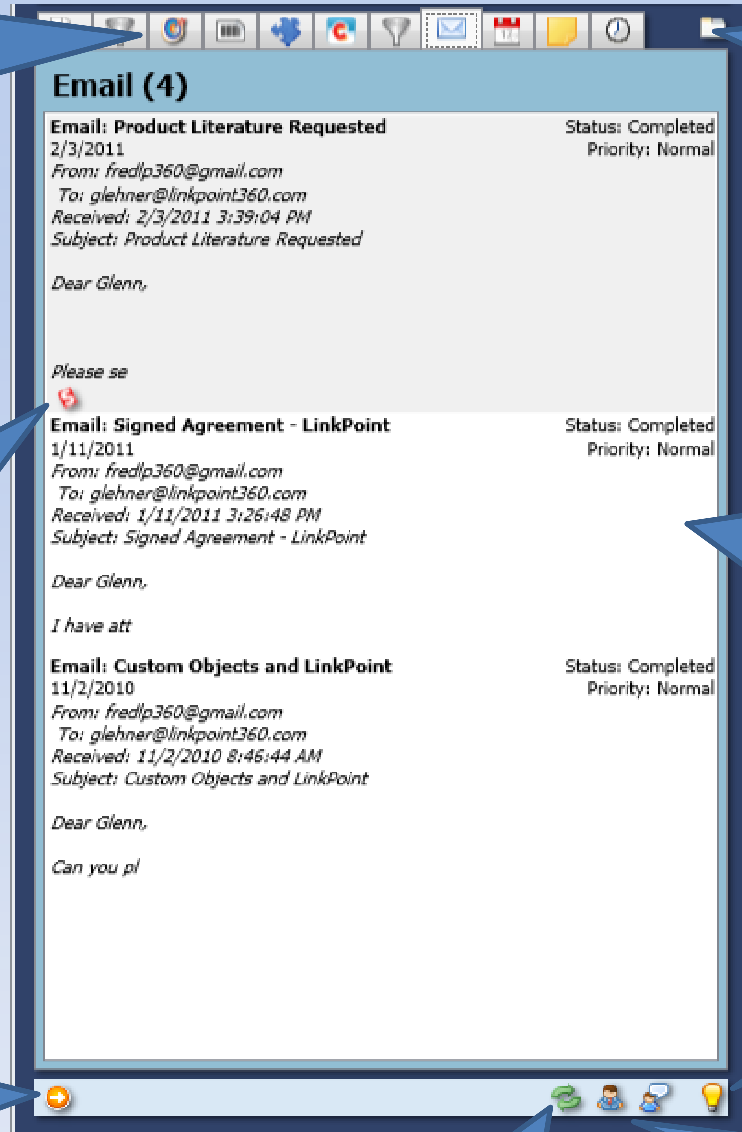
This informs you of what type of record this individual is. It may be a Contact or Lead or if we can not find an associated contact or lead in Salesforce, LinkPoint may display the lead from Jigsaw.

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.

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



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

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

This will minimize the Vue Pane.

This will refresh the Vue Data.

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

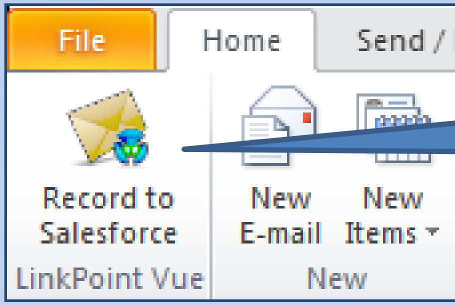
Quick Vue Window

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

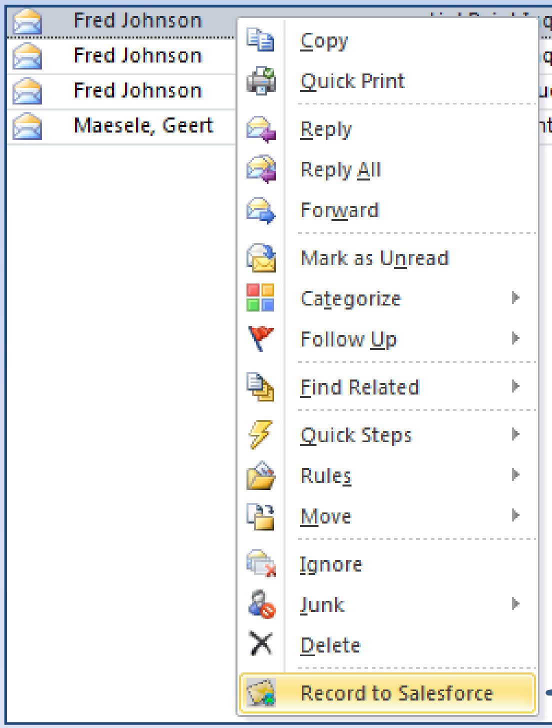
The content displayed is based on the record type you are viewing.

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

How To Record an Inbound Email

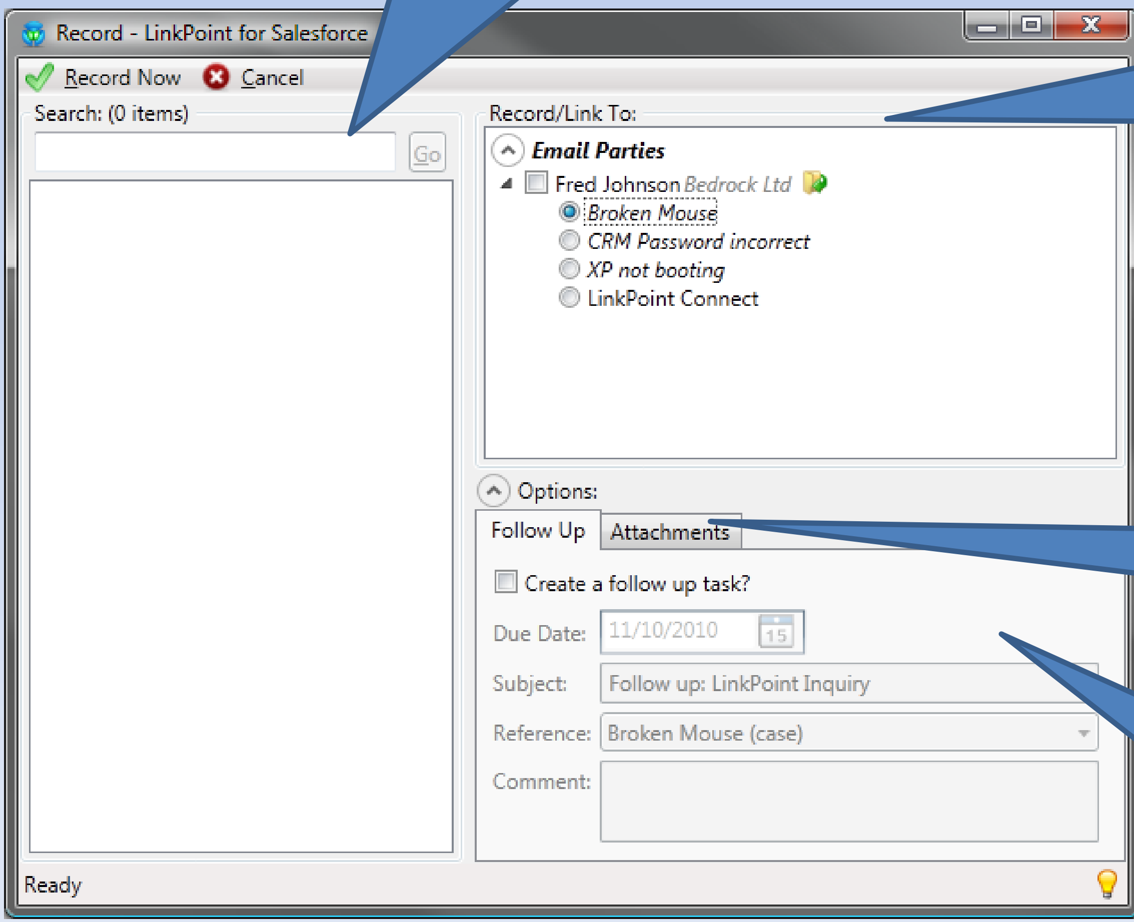


You can click on the “Record to Salesforce” button.



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.



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.

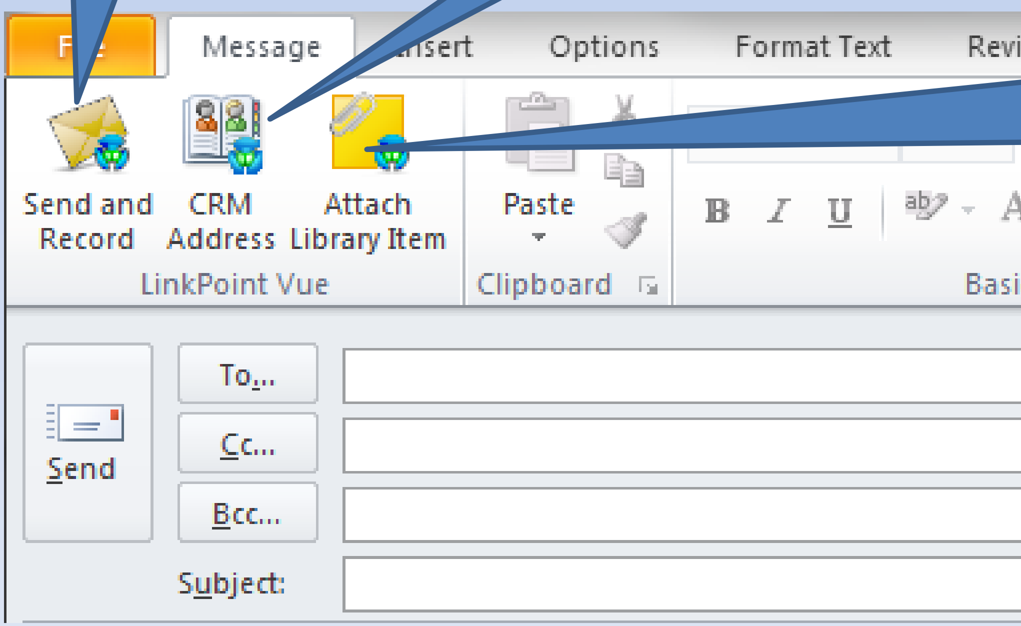
Along with the email, you can also create a “follow up task” to remind you to act on something later on.

How To Compose and Record an Outbound Email

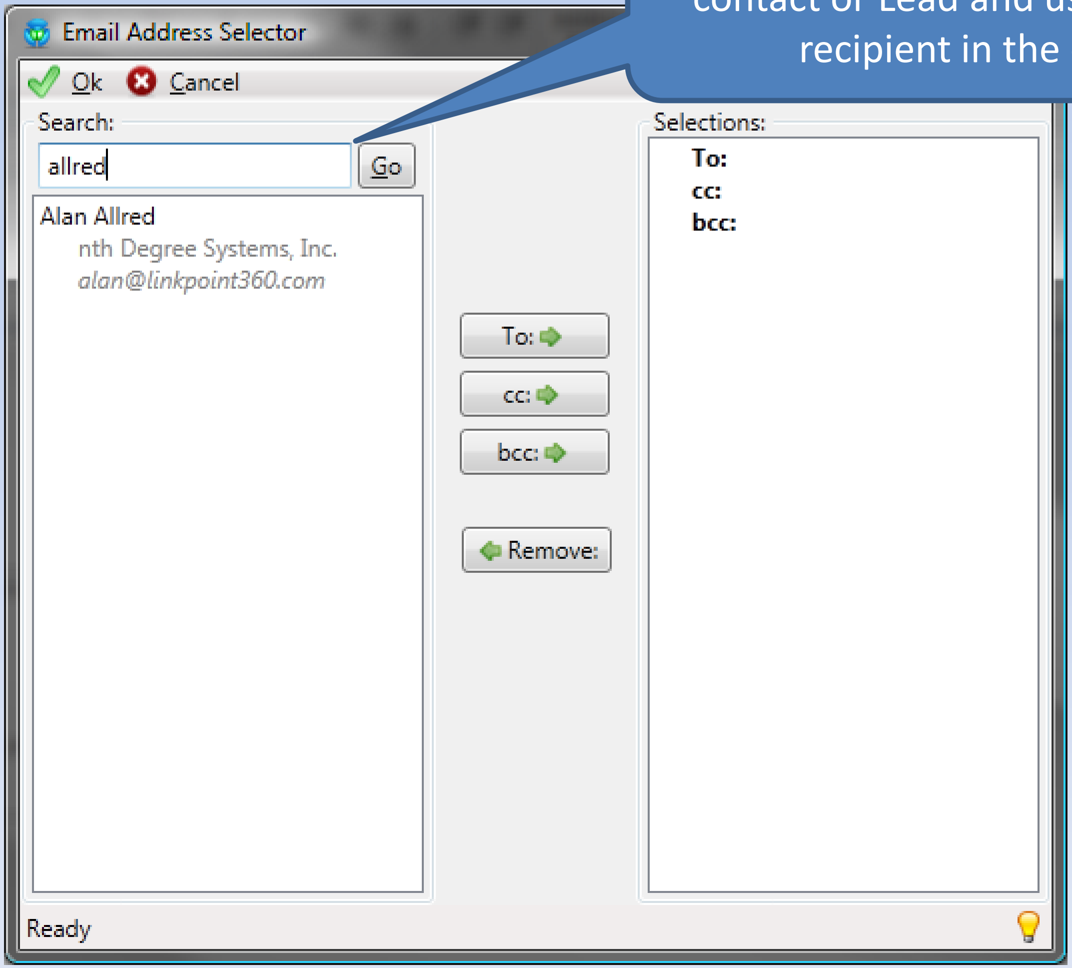
Send the email *and* record it back to Salesforce.

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

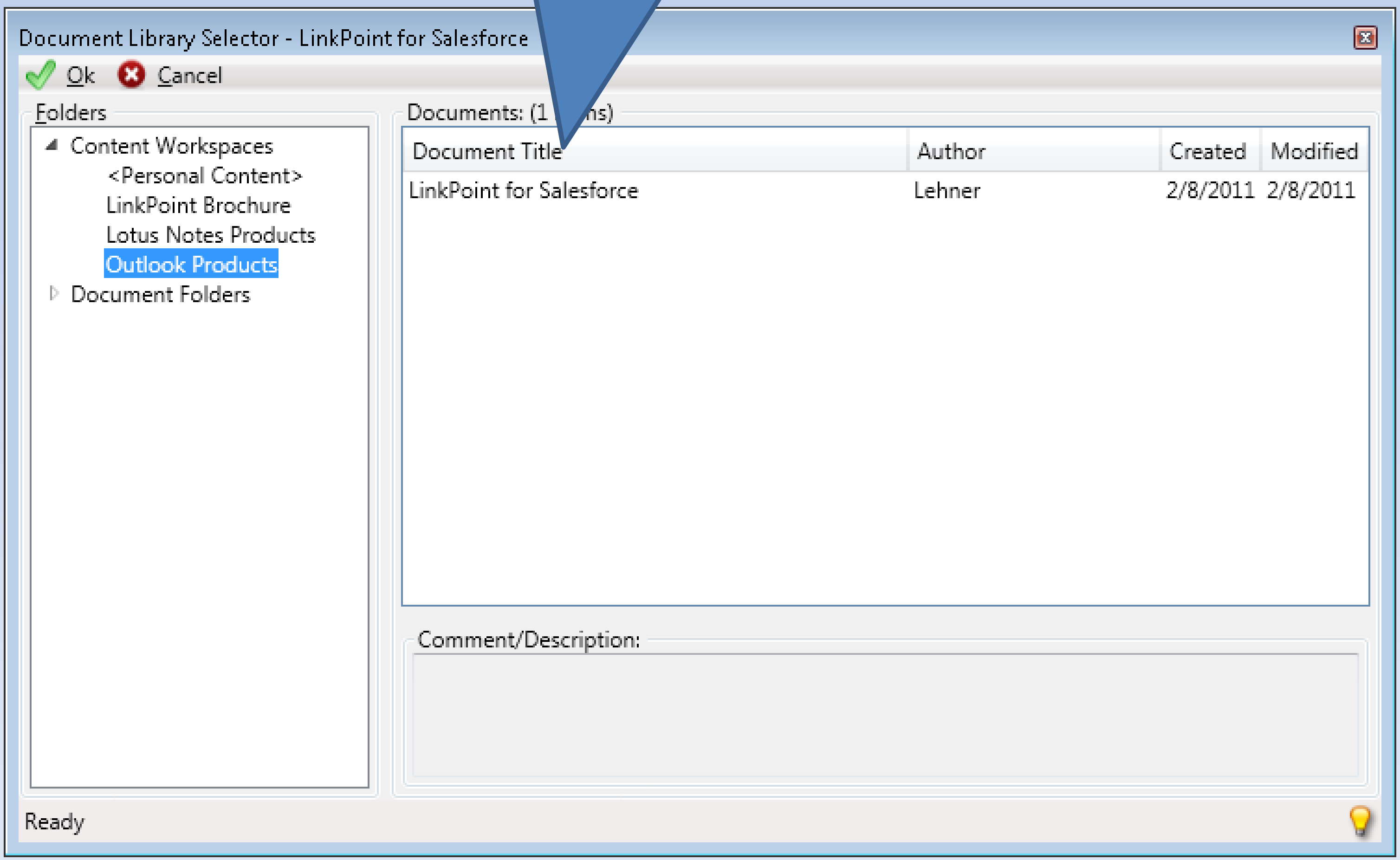
Attach documents from your Salesforce.com Document Library or Content Management System.



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



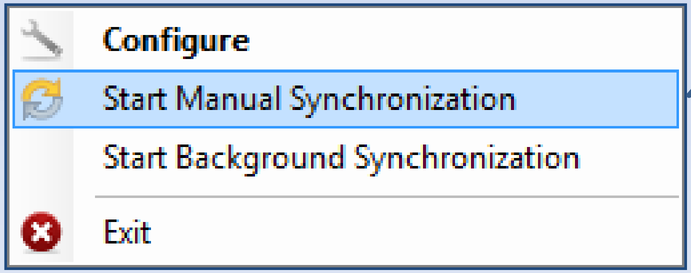
You can select any document from the Salesforce Document Library and add it as an Attachment on your email.



How To Synchronize Calendars, Contacts, And Tasks

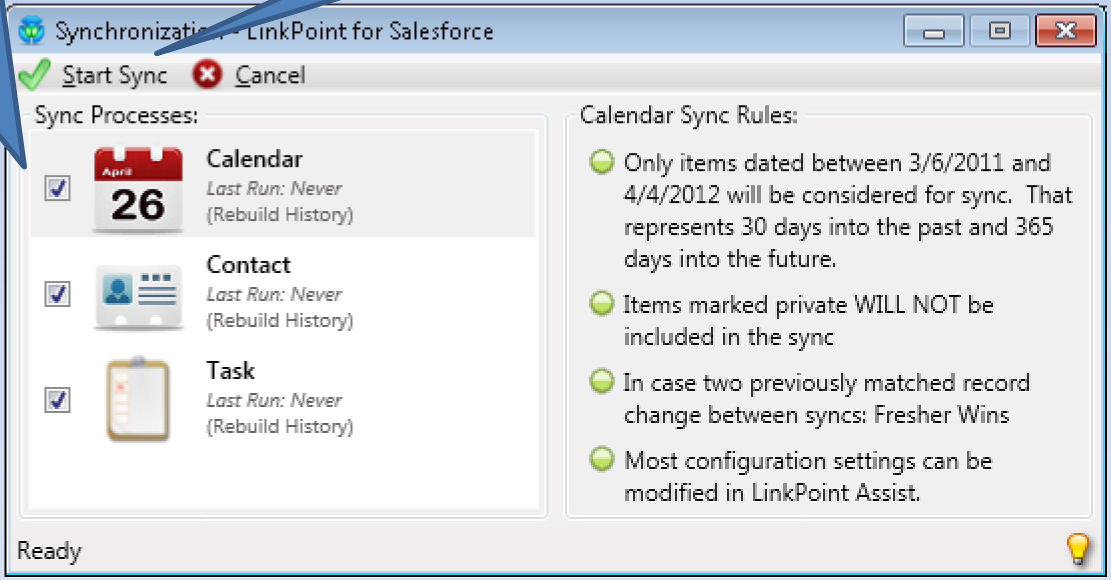
LinkPoint Assist runs in the system tray. It will can automatically run the synchronize process in the background or you can Right Mouse Click and Manually Synchronize.

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



To start the manual synchronization, click Start Sync.

Check any items that you want synchronized to Outlook.

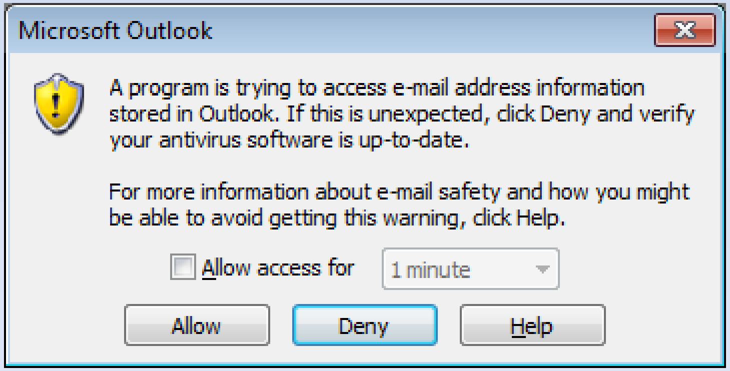


If you receive this Microsoft Outlook Message, you will need update your antivirus software.

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.

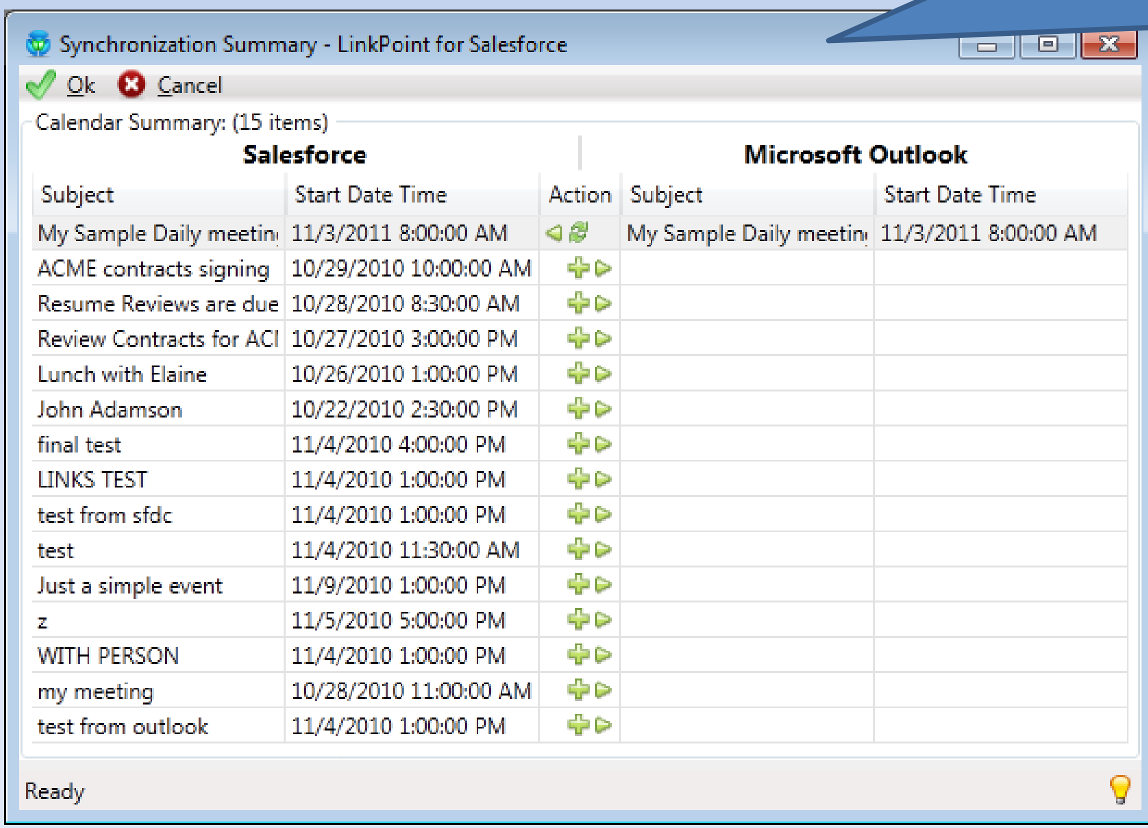
It can be downloaded from the following link:
http://www.microsoft.com/security_essentials/



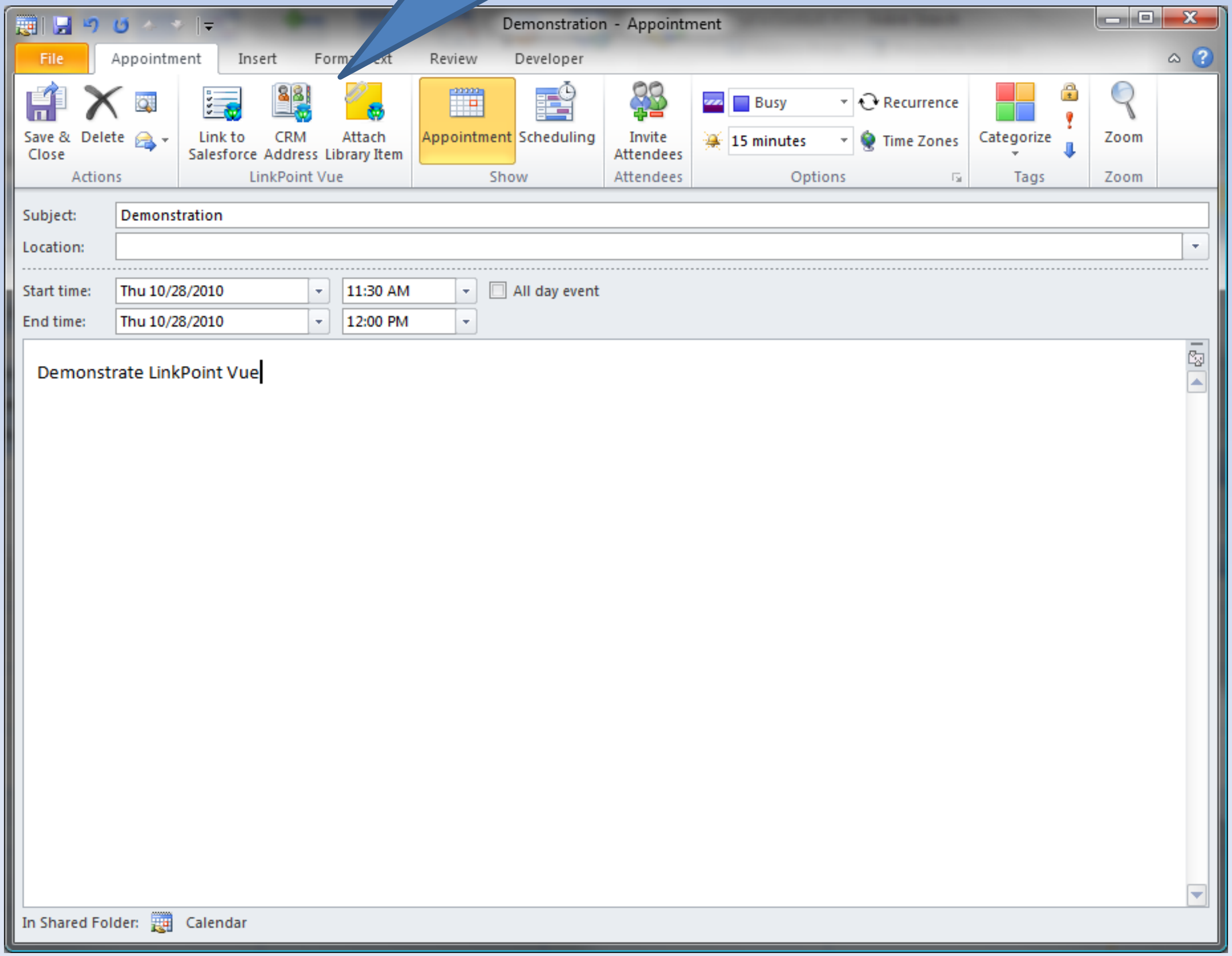
The Synchronization Summary screen is only displayed if you run a manual synchronization.

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

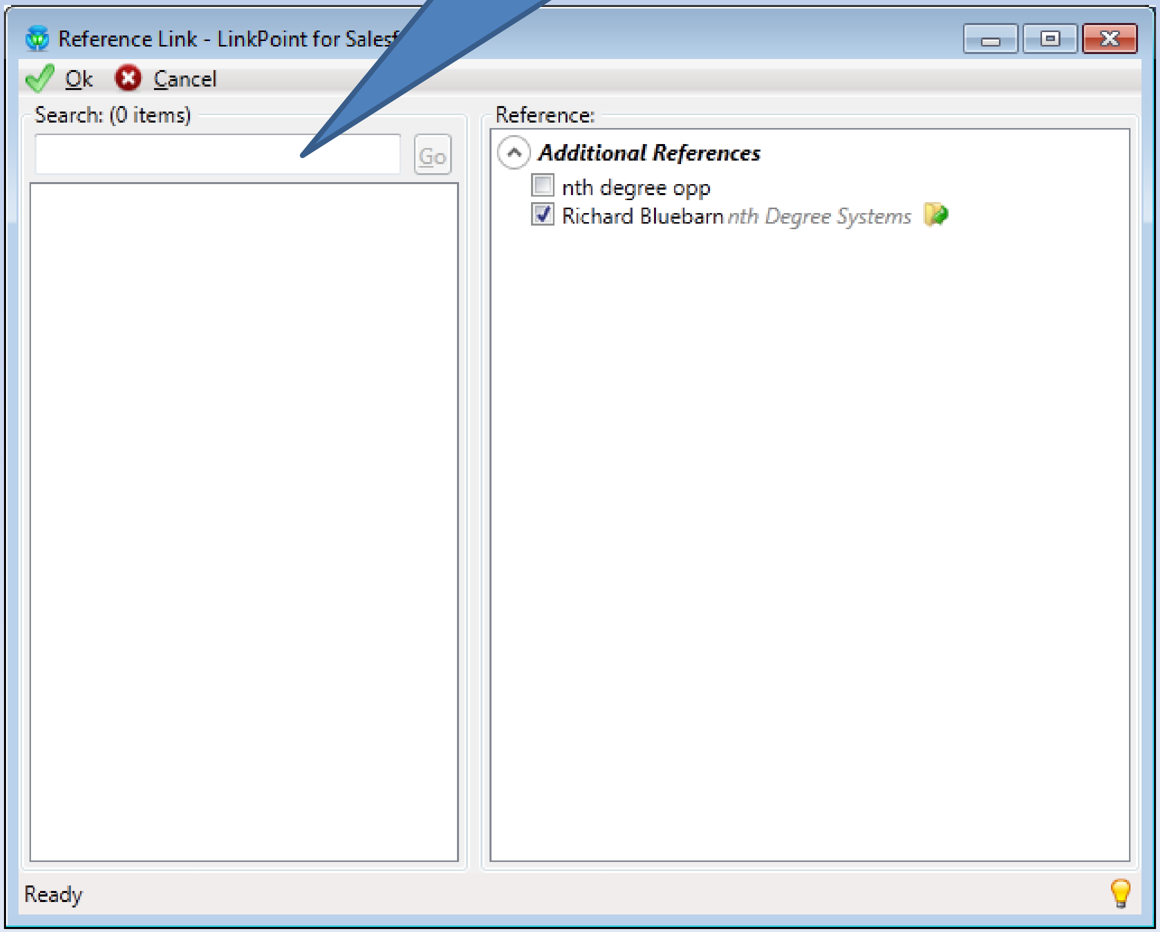
This will appear for Calendars, Contacts and Tasks.



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.



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