

LinkPoint for Salesforce

Outlook Integration for Salesforce

Learning Series

Recording Emails
to Salesforce

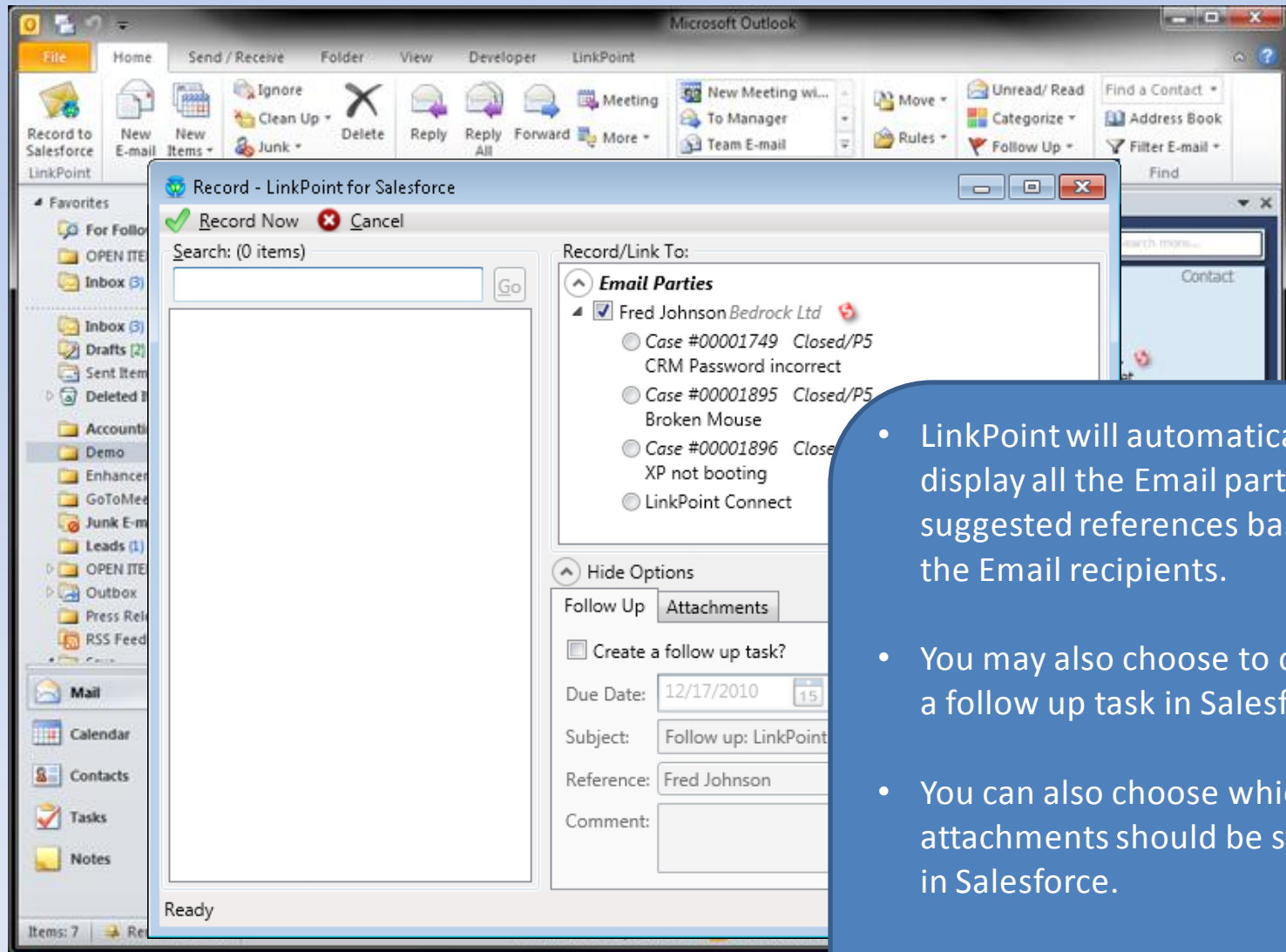
Recording an Inbound Email

The screenshot shows the Microsoft Outlook interface. In the top-left corner, the 'Record to Salesforce' button is highlighted with a blue circle. The main pane displays an email list with the following entries:

Sender	Subject	Date
Three Weeks Ago		
Fred Johnson	LinkPoint Inquiry	11/5/2010
Fred Johnson	LinkPoint Inquiry	11/5/2010
Michael James	Outlook Integration for Salesforce	11/2/2010
Fred Johnson	Custom Objects and LinkPoint	11/2/2010
Older		
Fred Johnson	LinkPoint Inquiry	8/23/2010
Fred Johnson	LinkPoint Inquiry	8/12/2010
Fred Johnson	LinkPoint Vue Inquiry	8/12/2010

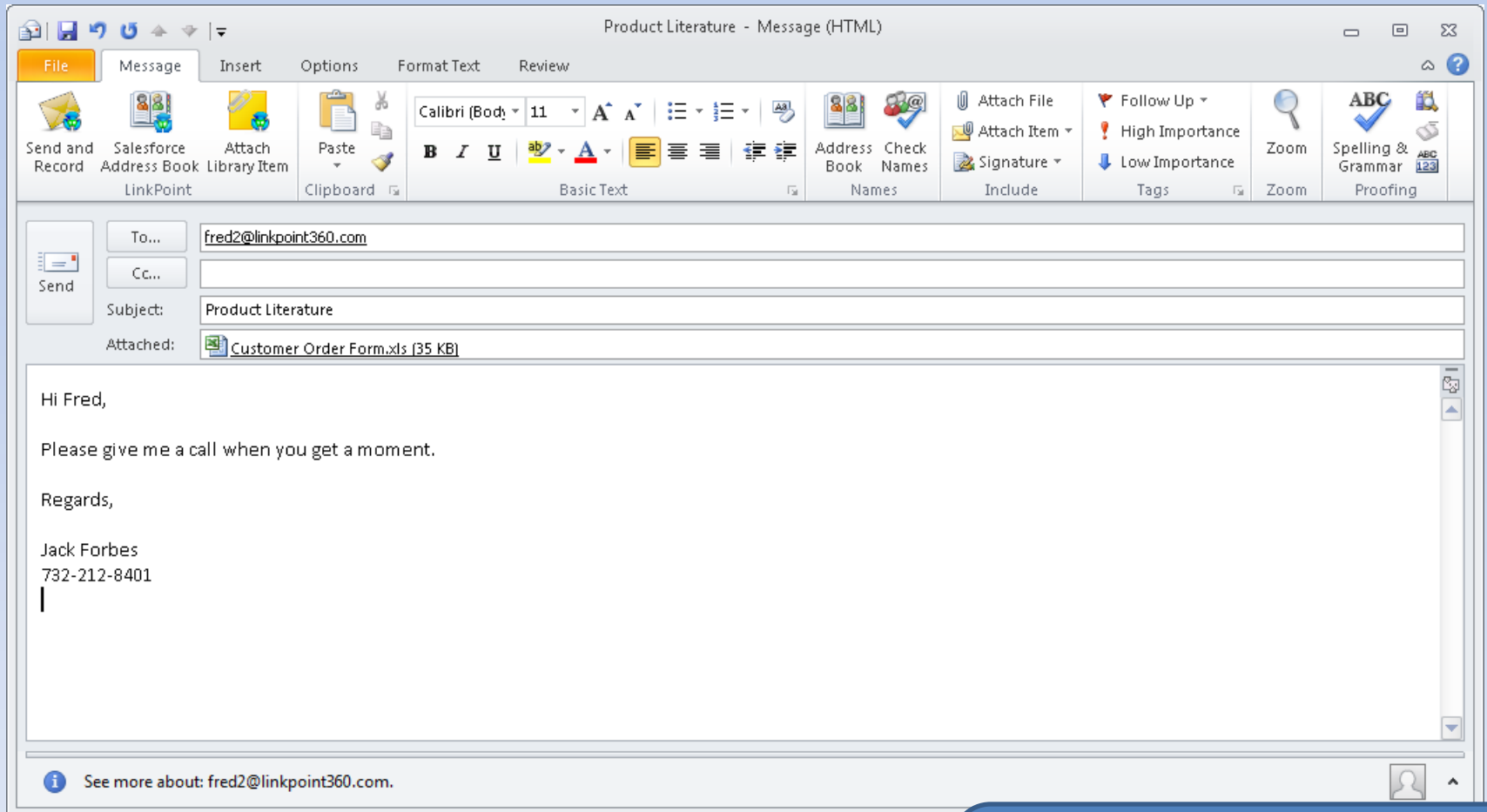
The right-hand pane shows a 'LinkPoint Vue' window with a contact card for Fred Johnson and a 'Contact Opportunity (3)' section listing items like 'Artic Snow Plow', 'Plow Adapter', and 'Snow Removal'.

- Select the email you would like to save into Salesforce.
- Press the “Record to Salesforce” button.

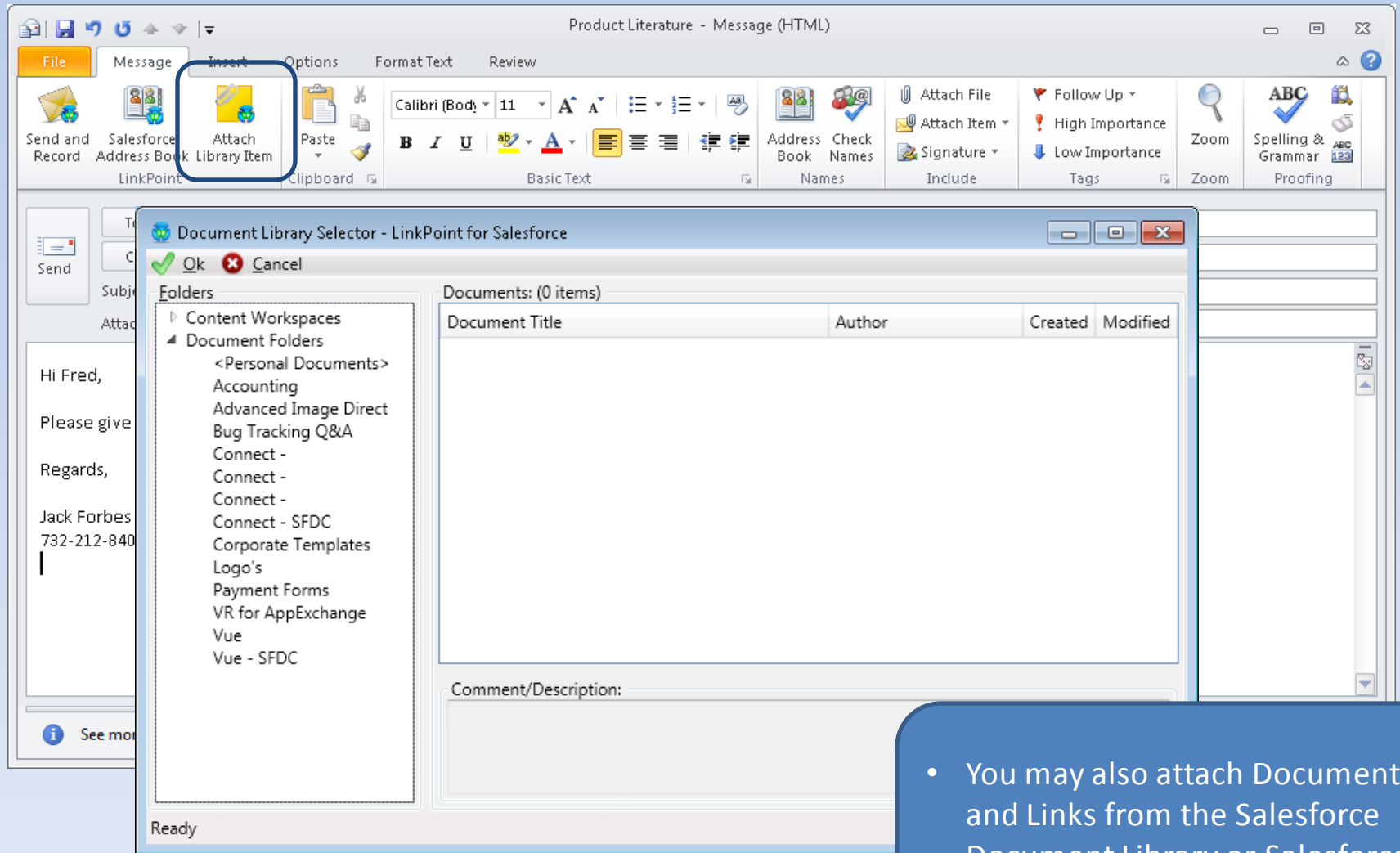


- LinkPoint will automatically display all the Email parties and suggested references based on the Email recipients.
- You may also choose to create a follow up task in Salesforce .
- You can also choose which attachments should be stored in Salesforce.
- Once recorded, it is now saved in Salesforce.

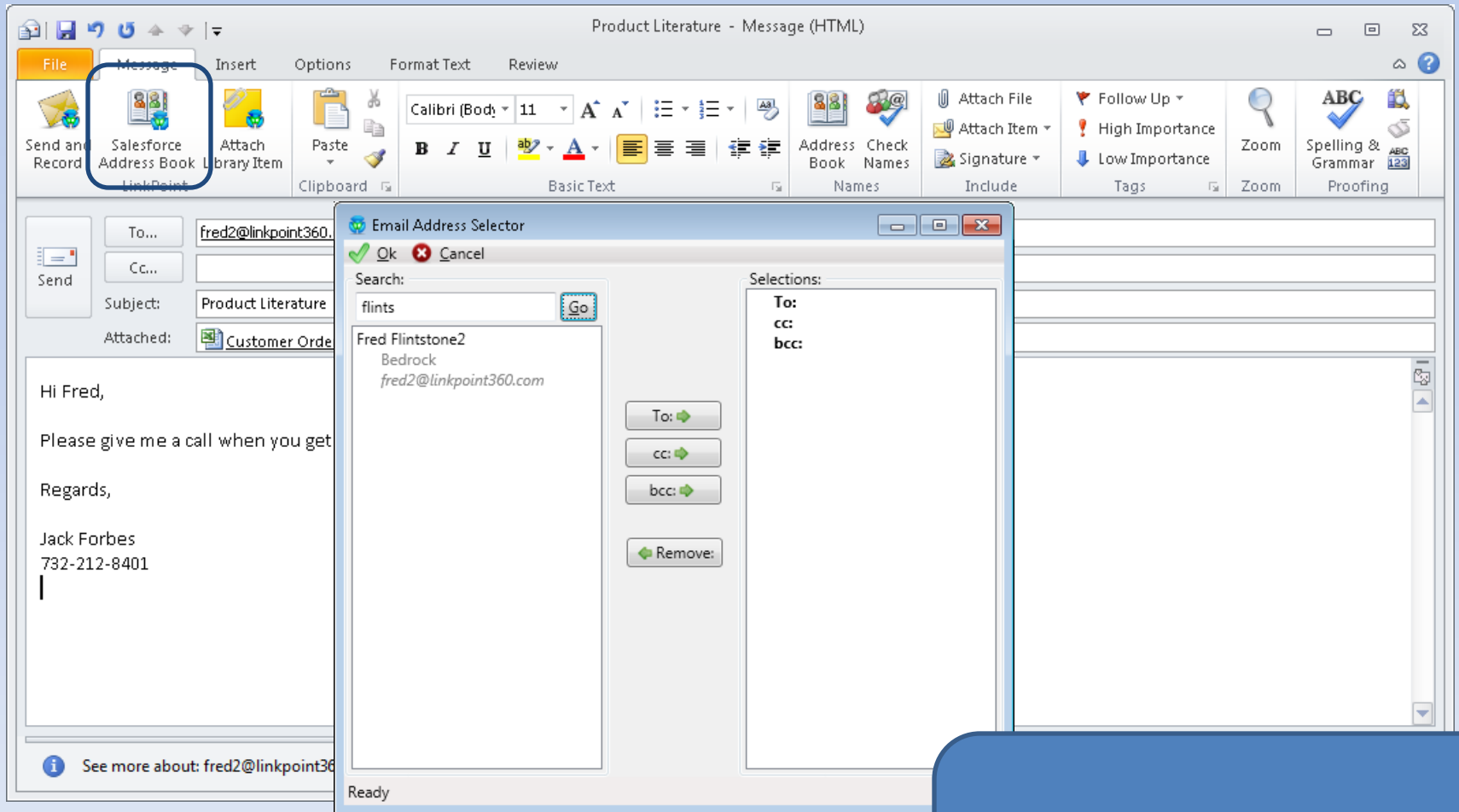
Recording an Outbound Email



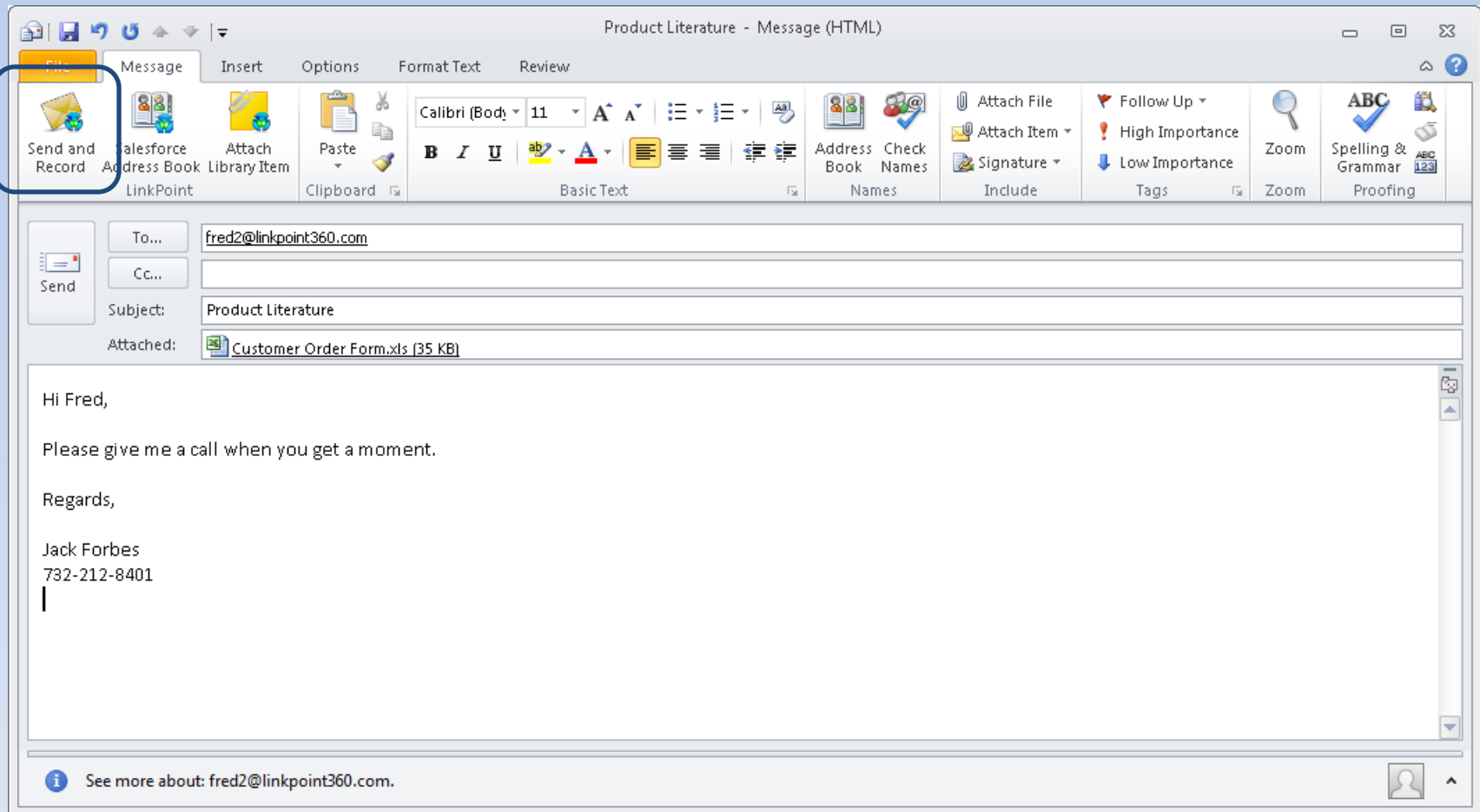
- Compose an Email in Outlook as you normally would.



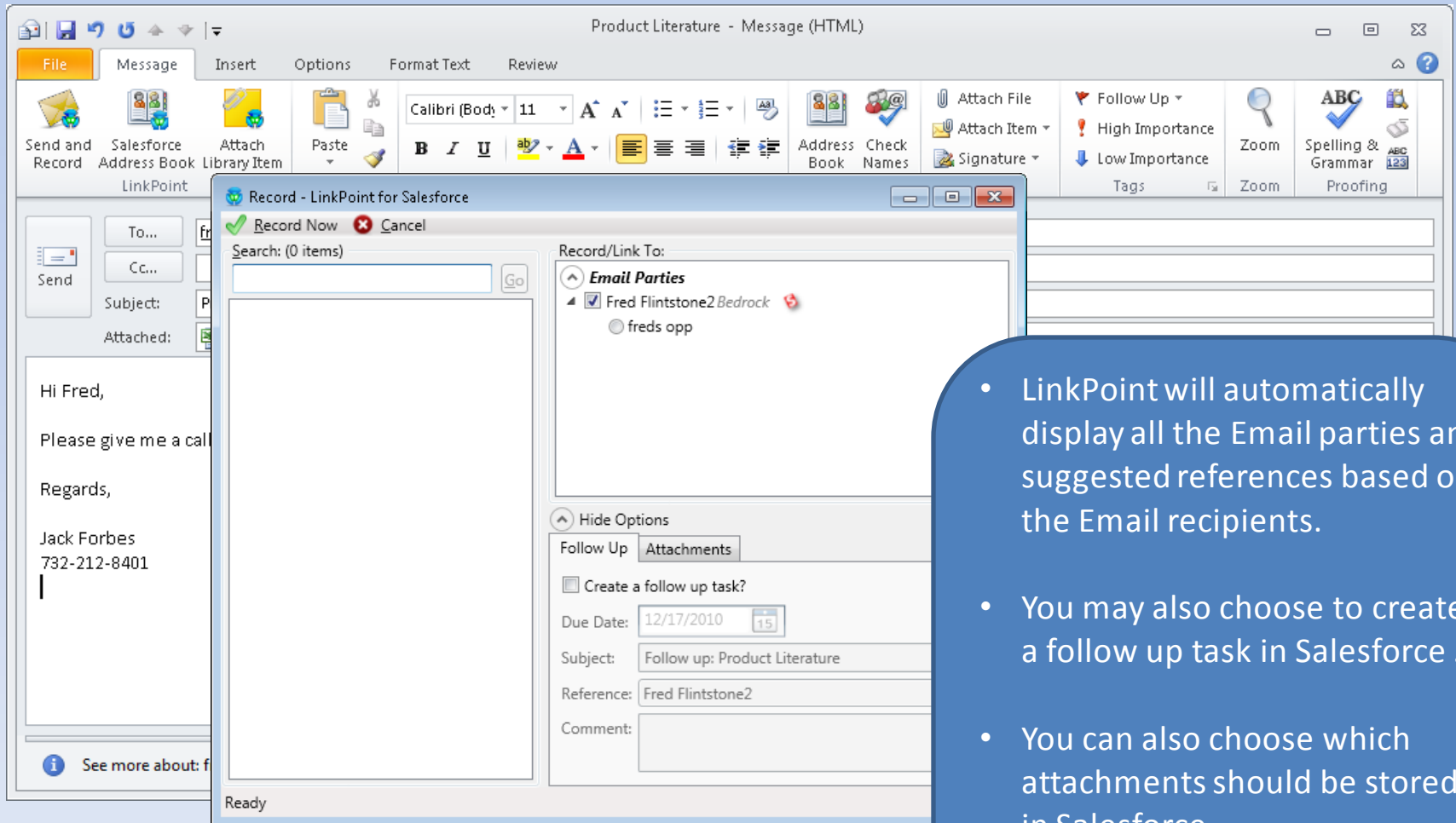
- You may also attach Documents and Links from the Salesforce Document Library or Salesforce Content Management System.



- You may also use Salesforce as an Address Book to select Email Recipients.



- Press the “Send and Record” button to send the email via Outlook and save to Salesforce.



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