LinkPoint Connect User Guide

IBM Notes & Microsoft Dynamics CRM Integration

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Overview

About LinkPoint Connect

LinkPoint Connect streamlines data entry and access by enabling users to instantly view CRM data within their email client. Users can record inbound/outbound emails to contacts, leads, opportunities, cases, and custom objects with just a few clicks. Users can also instantly create new contacts from an email signature with simple drag-and-drop functionality, eliminating manual data entry. LinkPoint Connect synchronizes calendars, contacts and tasks to the CRM directly from the email application, and robust configuration options let users control how and which data is recorded and synched.

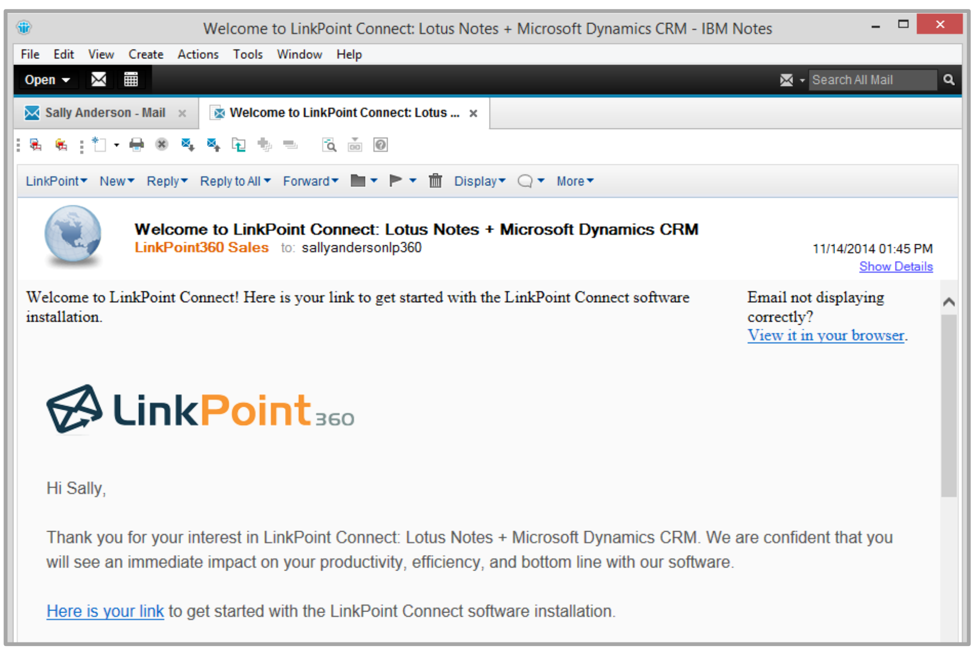
Installing LinkPoint Connect

Installing LinkPoint Connect

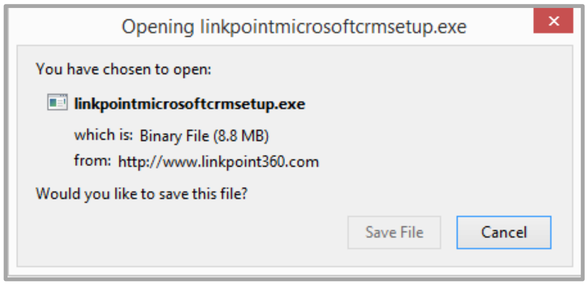
In this section, you will learn how to install the LinkPoint Connect software. Users can access the LinkPoint Connect Installer in several ways including the LinkPoint360 Evaluation Form or a direct link provided by a LinkPoint360 Account Executive. All methods provide access to the same Installer for users of both the free trial and licensed product.

The following steps apply to individual user installation of the LinkPoint Connect for IBM Notes + Microsoft Dynamics CRM software. For users in Terminal Services or Citrix environments, please refer to additional documentation.

1. Select the link for the LinkPoint Connect installer provided in the welcome email, or enter the URL in your browser address bar and press **Enter**.

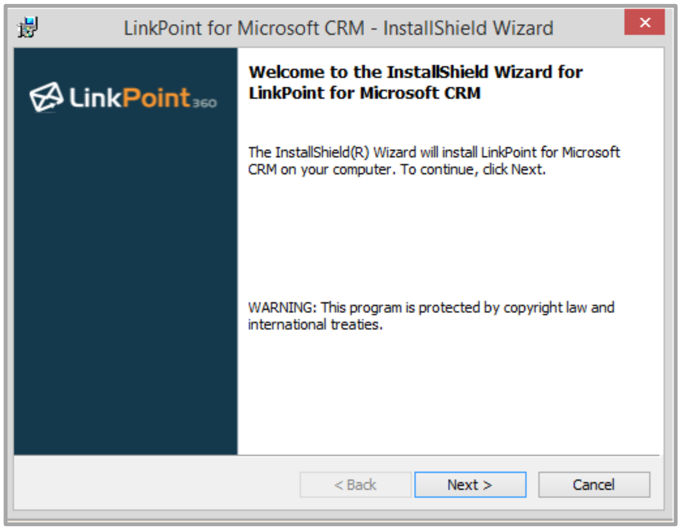


2 Click the **Save File** button within the dialogue box to download the LinkPoint Installer to your system.

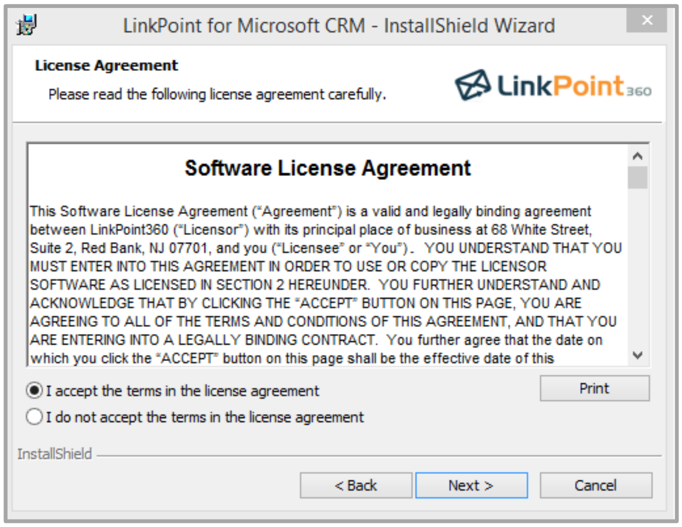


3 Locate the file **LinkPointMicrosoftCRMSetup.exe** on your computer and double click the file to launch the installer.

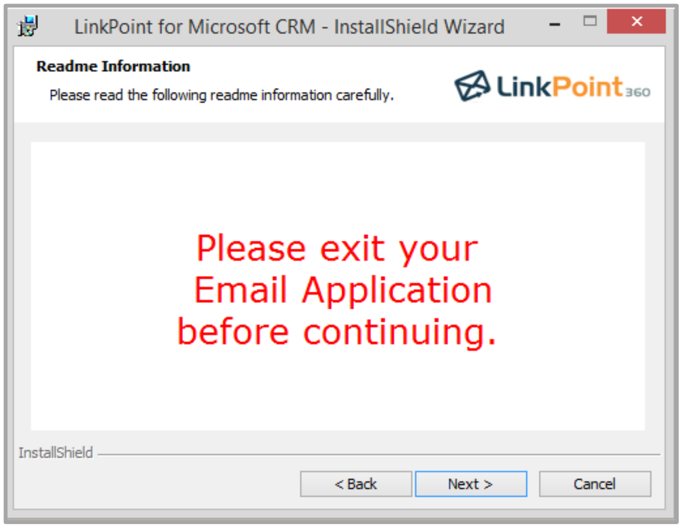
4 Click **Next** on the first screen within the **LinkPoint for Microsoft CRM – InstallShield Wizard** to start the installation process.



5 Select the **I accept the terms in the license agreement** option, and then click the **Next** button to proceed.



6 Close IBM Notes if you have not done so already. Be sure to close the email application before clicking the **Next** button in the Installer to continue.



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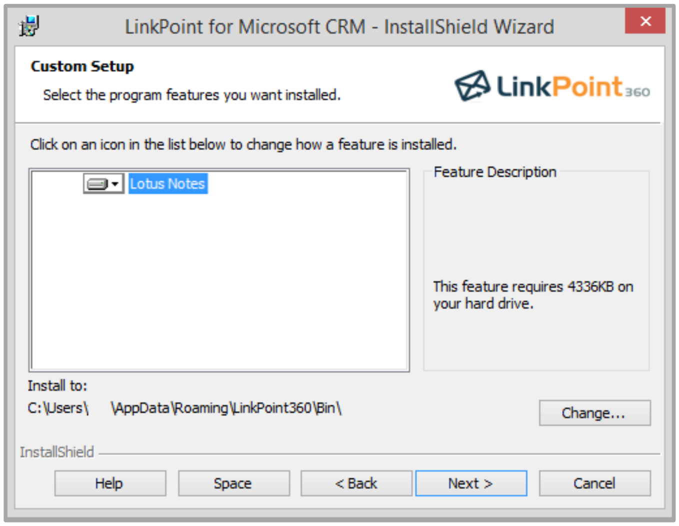
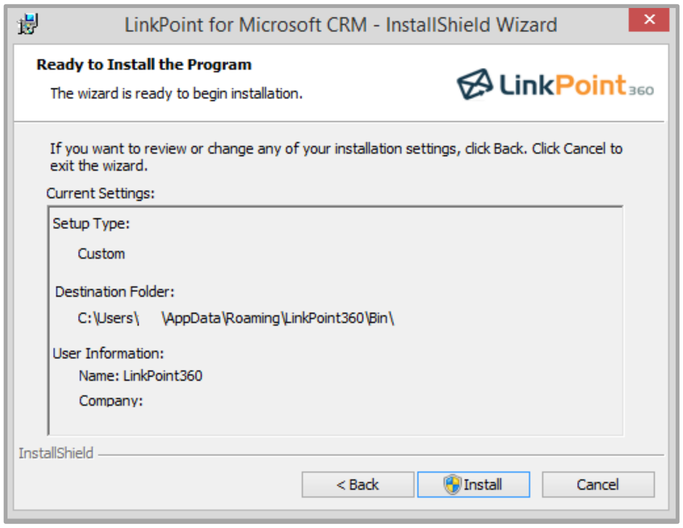
Select the installation preferences within the Custom Setup screen. By default, the Installer will place the LinkPoint Connect software on the system hard drive. Click the **Next** button to continue.



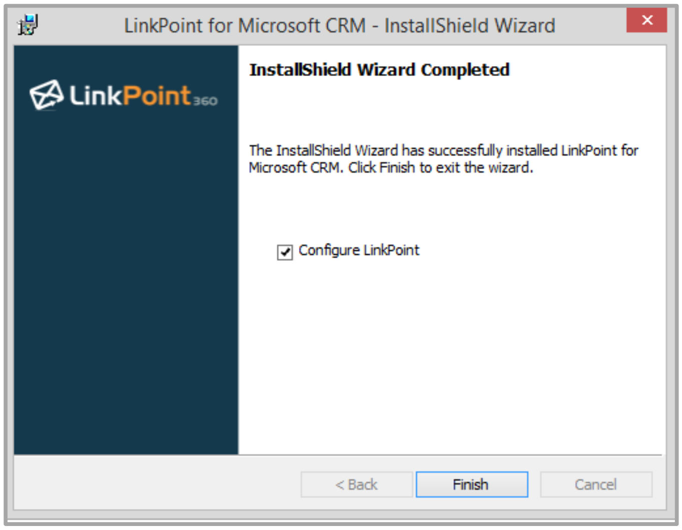
8

Review the **Current Settings** for the installation. Click the **Back** button to make changes, or click the **Install** button to start the installation.



Tip: LinkPoint Connect relies on a common Microsoft technology called **.NET Framework 4 Client Profile** which comes pre-loaded on Windows 7 and above. If your computer does not already have this installed, it will automatically be downloaded as part of the LinkPoint Connect installation process.

9 With the **Configure LinkPoint** checkbox selected, click the **Finish** button to exit the installer.

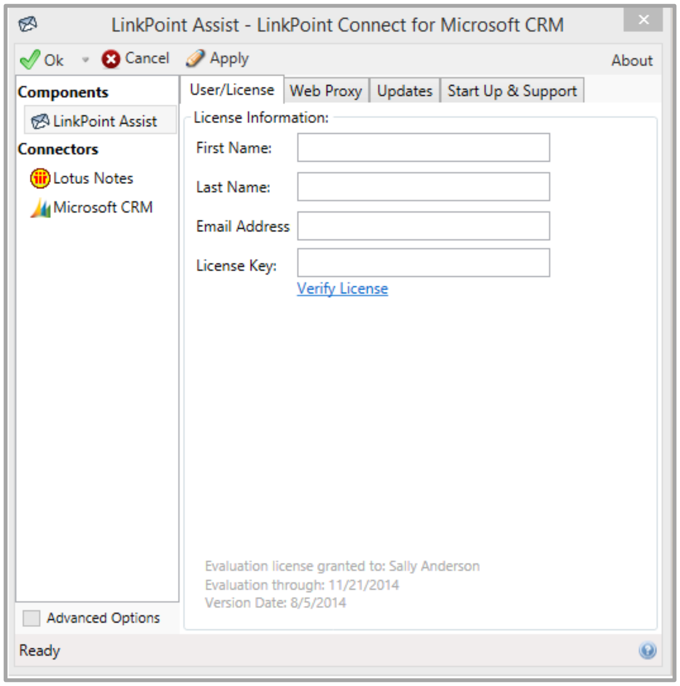


Tip: If you are not ready to configure LinkPoint Connect, you can uncheck the **Configure LinkPoint** box and click **Finish**. Follow the steps for Entering a License Key in the next section of this User Guide when you are ready to proceed.

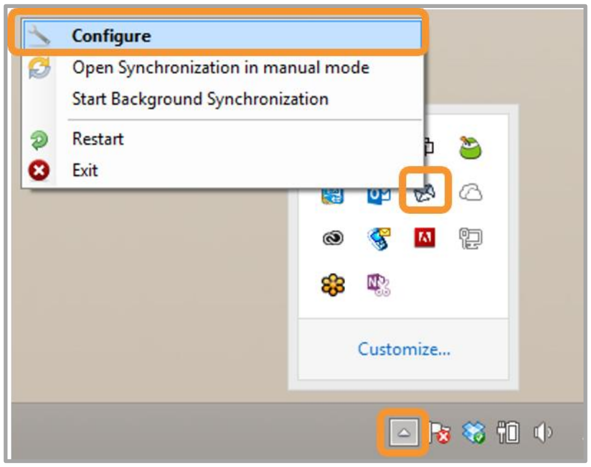
Entering a License Key

In this section, you will learn how to enter your LinkPoint Connect License Key, which is necessary in order to be able to use the product.

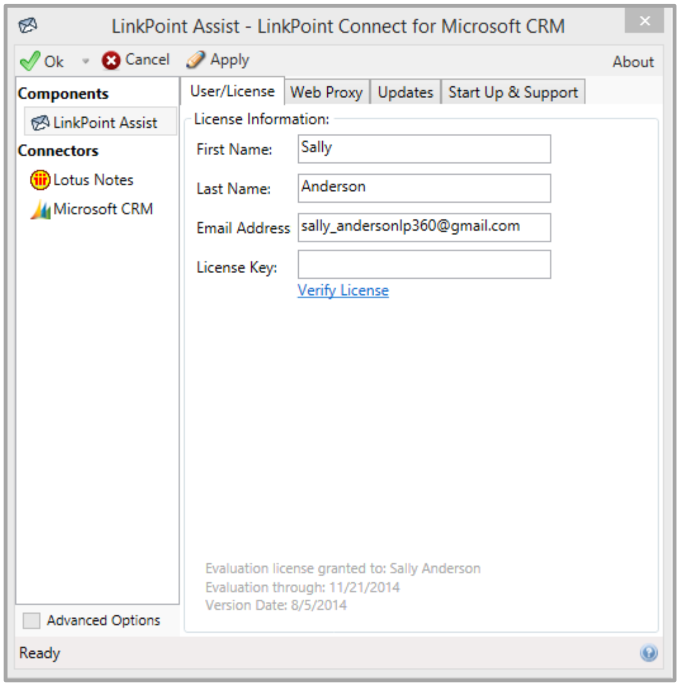
1 Launch the **LinkPoint Assist** window.



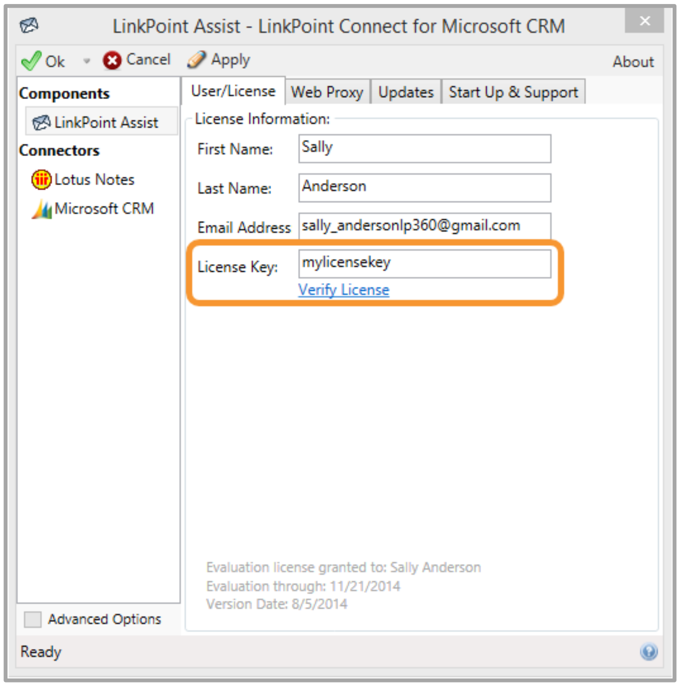
Tip: You may automatically arrive within LinkPoint Assist by checking the option to **Configure LinkPoint** when finishing the installer. You can also access these settings by right clicking the **LinkPoint Assist** icon in the system tray near your desktop clock and then selecting **Configure**.



2 Enter the required information for the **First Name**, **Last Name**, and **Email Address** fields.



3 Enter the **License Key** provided in the welcome email, and click **Verify License**.

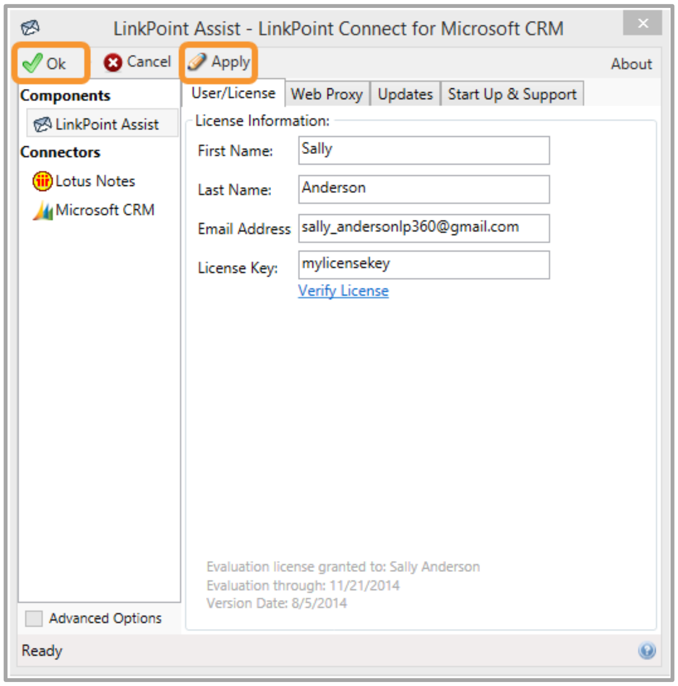


Tip: If you are installing LinkPoint Connect as part of the free trial, the License Key will be **Evaluation**. This field may already be populated for you.

Warning: If you have purchased LinkPoint Connect after participating in the free trial, you will need to follow the steps to update your License Key from Evaluation to the License Key provided in your welcome email.

Tip: If you enter your unique license key but the field reverts back to an Evaluation license key, your firewall may be blocking access to the LinkPoint Connect server or there may be an issue with the proxy settings. Please contact your internal IT team for assistance.

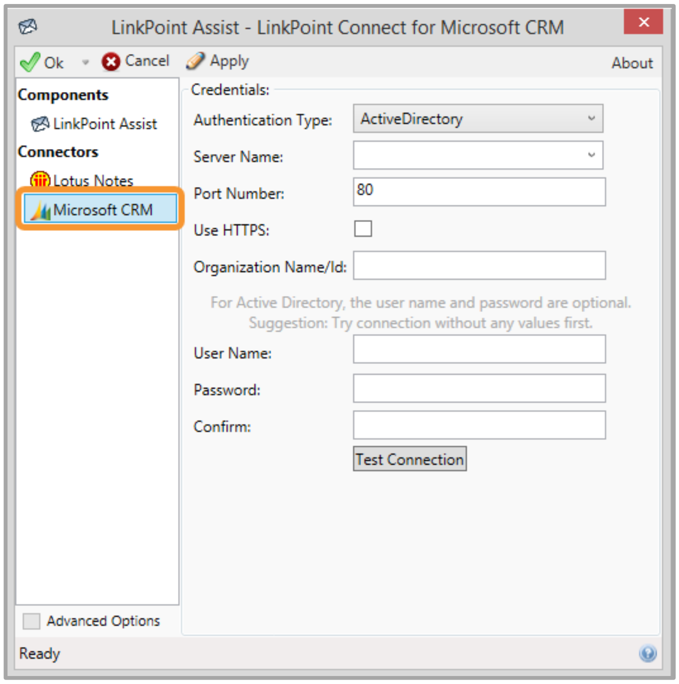
4 Click **Apply** and then click **Ok** to save the changes.



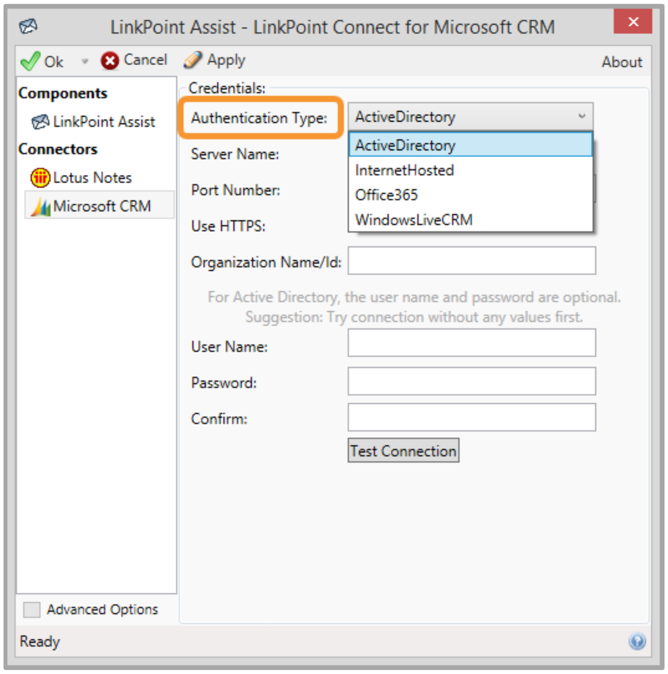
Connecting LinkPoint Connect to Microsoft Dynamics CRM

In this section, you will learn how to connect your Microsoft Dynamics CRM account to the LinkPoint Connect software.

1 Launch the **LinkPoint Assist** window, and select **Microsoft CRM** from the left-hand menu.

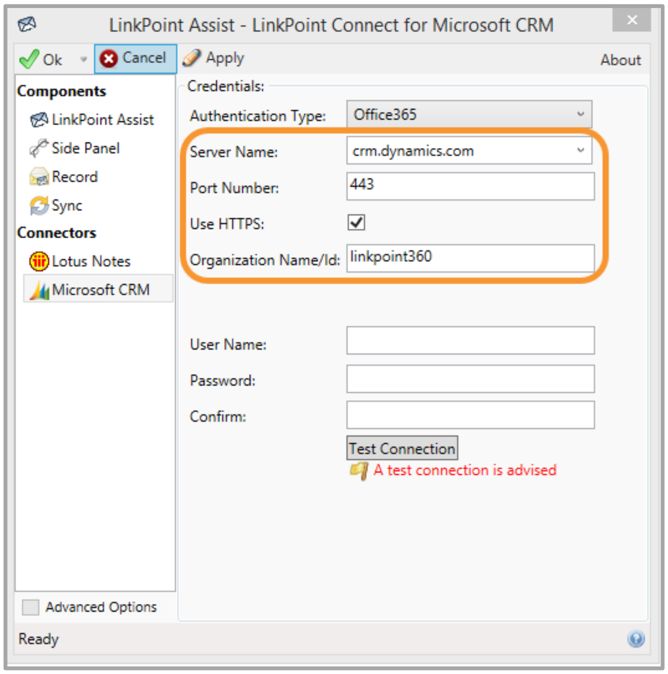


2 Select the **Authentication Type** from the drop-down list.



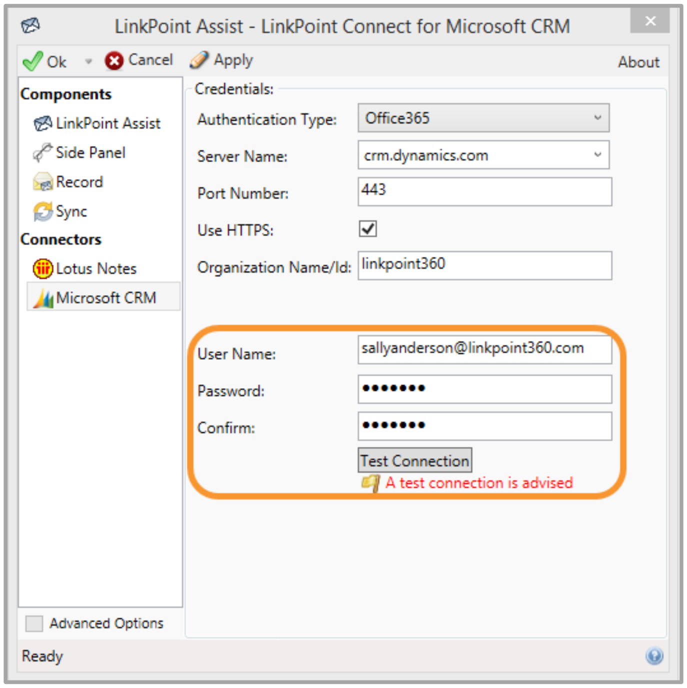
Example: In this example, we will demonstrate the connection settings with the Office365 Authentication Type. You will select the type that corresponds with your organization's Microsoft Dynamics CRM set up.

3 Enter your **Server Name**, **Port Number**, and **Organization Name/Id** in the corresponding fields. Select or deselect the **Use HTTPS** checkbox as needed.



4

Enter your **User Name**, **Password**, and **Confirm** the password in the corresponding fields. Click the **Test Connection** button to attempt to connect with Microsoft Dynamics CRM.



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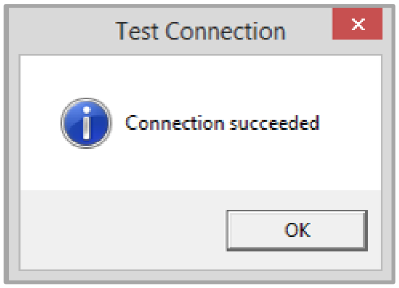
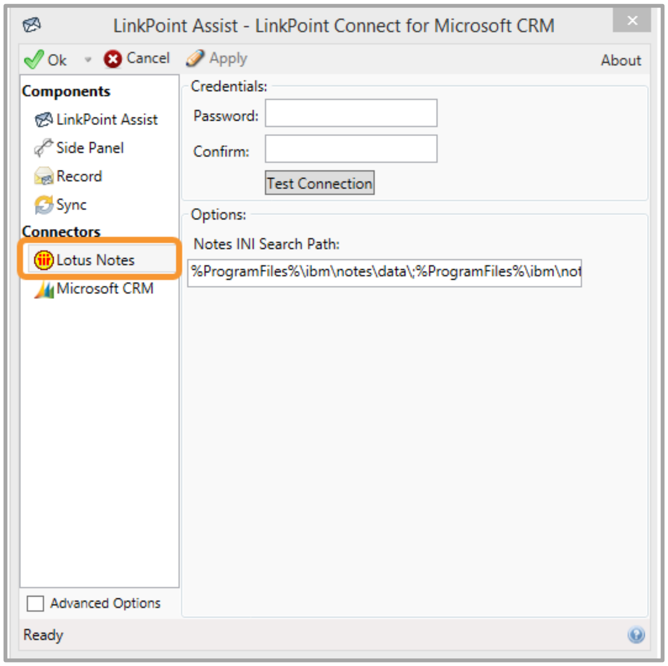
LinkPoint Connect will test the connection to Microsoft Dynamics CRM. This may take a few moments. Click **OK** once the **Test Connection** window displays the **Connection succeeded** message.



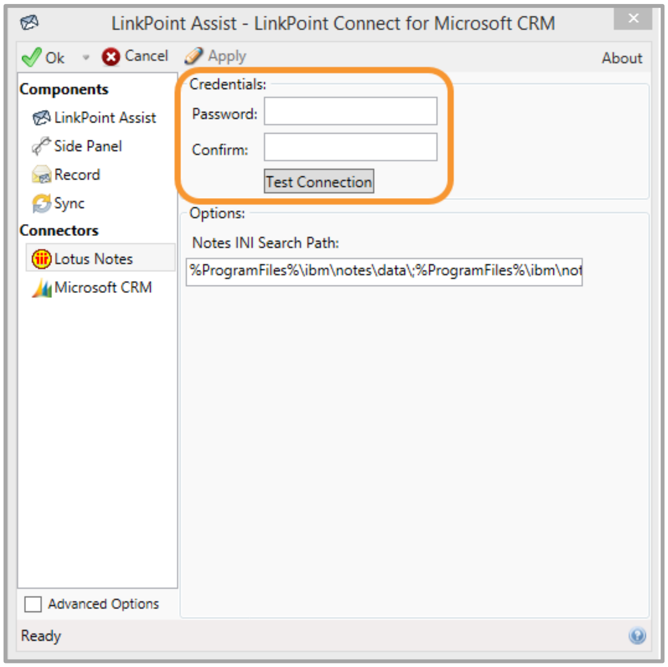
Connecting IBM Notes and LinkPoint Connect

In this section, you will learn how to connect your IBM Notes account to the LinkPoint Connect tool.

1 Launch the **LinkPoint Assist** window, and select **IBM Notes** from the left-hand menu.

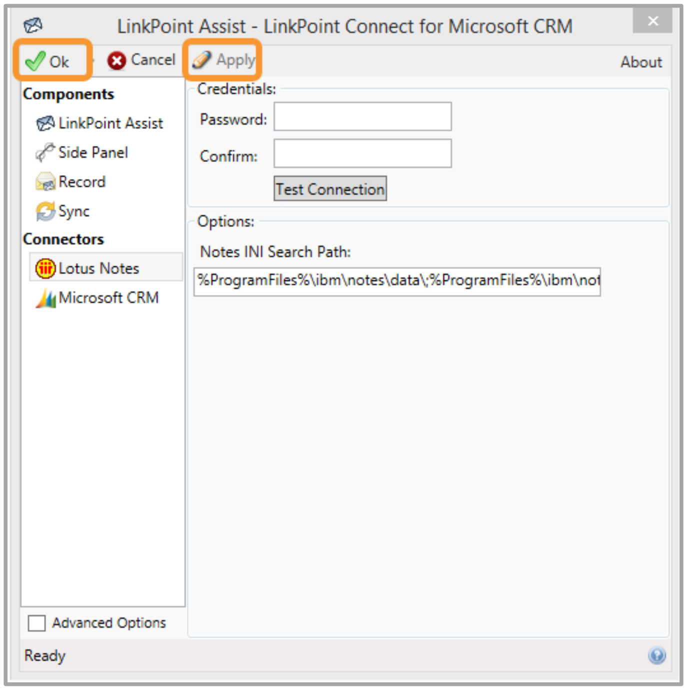


2 Enter the IBM Notes password in the **Password** and **Confirm** fields. Then, click the **Test Connection** button.



3

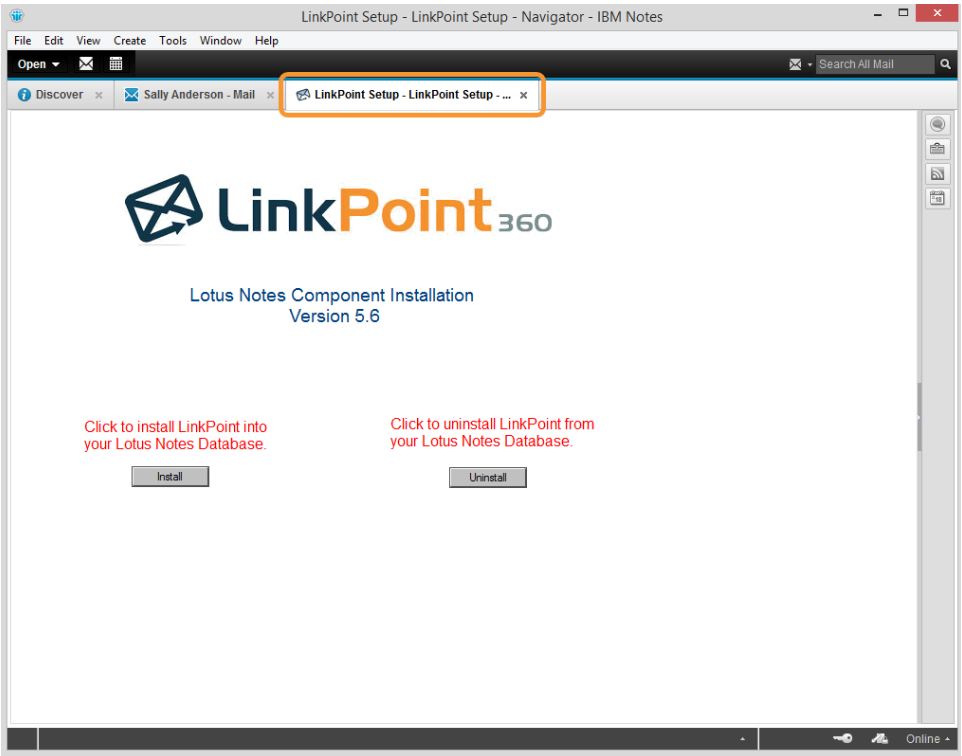
Click **Apply** and then click **Ok** to save the changes.



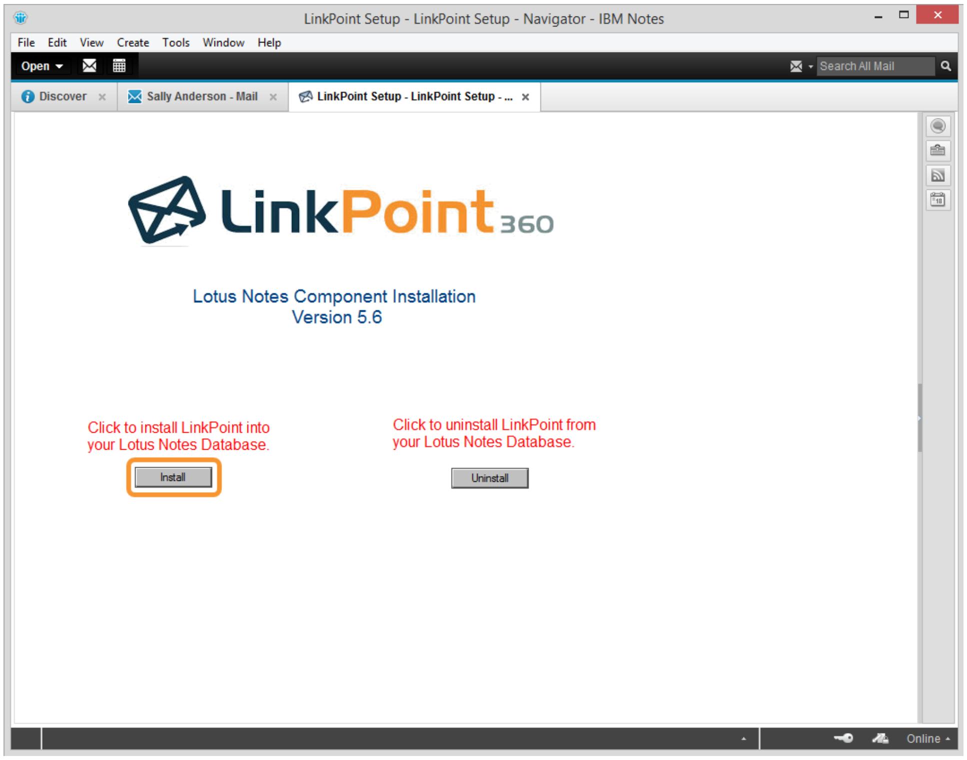
Installing LinkPoint Connect Actions within IBM Notes

In this section, you will learn how to install LinkPoint Connect action commands and templates in your instance of IBM Notes. These options provide users with additional productivity features during the email drafting and sending processes. This option is only needed during the LinkPoint Connect process or if your organization is not modifying the IBM Notes Mail Template to include LinkPoint Connect Action Scripts.

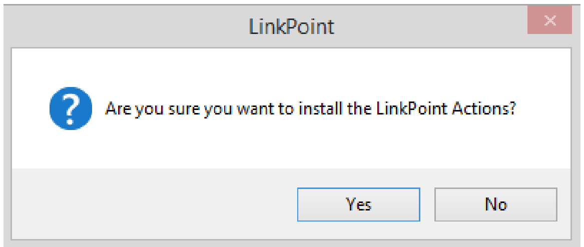
1. Open **IBM Notes** and select the **LinkPoint SetUp** tab.



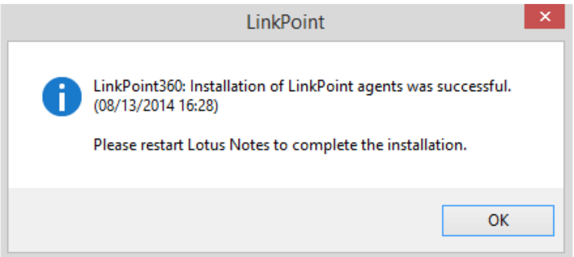
2 Click the **Install** button to install LinkPoint Connect actions within the IBM Notes database.



3 Click the **Yes** button to confirm the installation.



4 Click the **OK** button to restart IBM Notes and complete the LinkPoint Connect Actions installation.

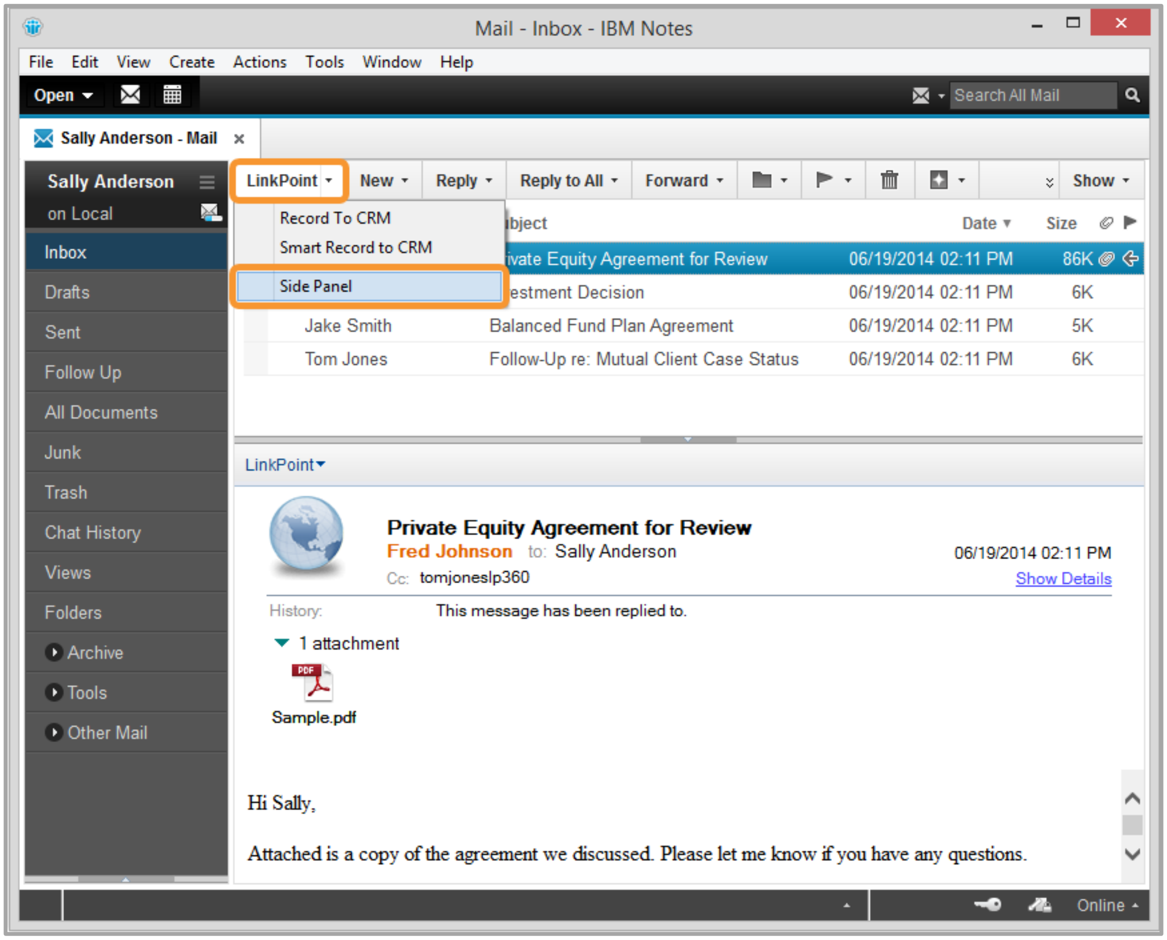


Using the LinkPoint Connect Panel in IBM Notes

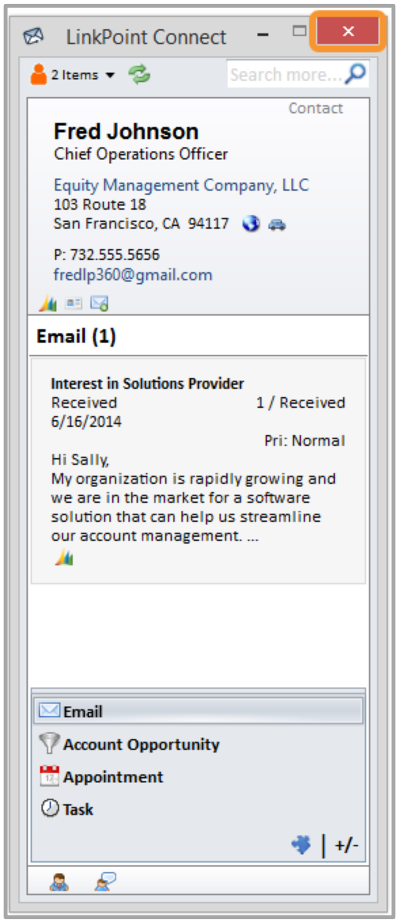
Showing and Hiding the LinkPoint Connect Side Panel

The LinkPoint Connect Side Panel is designed to enable users to spend the majority of their time working directly within IBM Notes and still see content that is updated in real time from Microsoft Dynamics CRM. Users can also jump directly to specific records in Microsoft Dynamics CRM, without the need to search and scroll for information. The Side Panel enables users to see the specifics about who the contact is, where users left off in the sales or support process, and the interaction that others in the company may have had with the contact. The LinkPoint Connect Side Panel shows what is in Microsoft Dynamics CRM and lets users access the information dynamically.

1 Open **IBM Notes**. Select **LinkPoint** from the templates menu, and select **Side Panel** from the drop-down list.



2 Select the **red x** button in the top right corner of the Side Panel to close it.

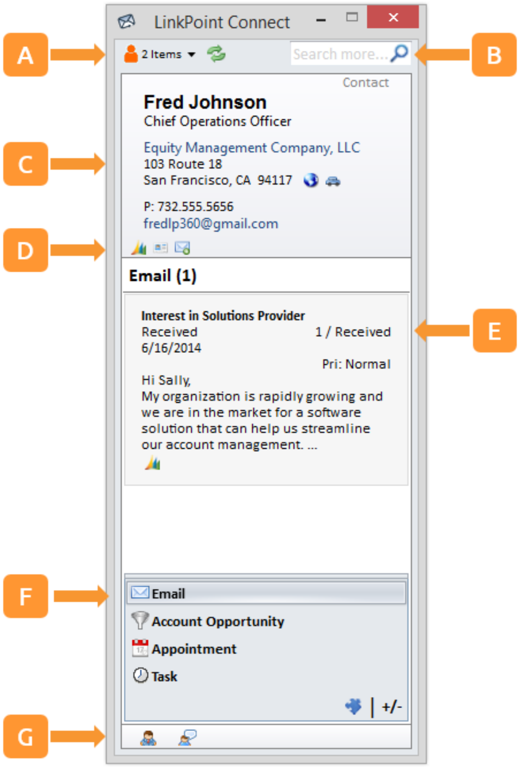


Viewing Microsoft Dynamics CRM Data in IBM Notes

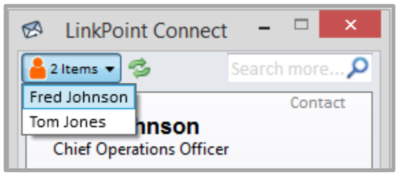
The LinkPoint Connect Side Panel enables users to view their Microsoft Dynamics CRM data directly within IBM Notes. This section will demonstrate the types of information that are accessible within the LinkPoint Connect Side Panel and how users can interact with the data.

1 Open **IBM Notes** and launch the LinkPoint Connect Side Panel. The Side Panel will automatically populate with data related to the selected email if the contact's email address exists within Microsoft Dynamics CRM.

2 Explore the seven main sections of the LinkPoint Connect Side Panel.

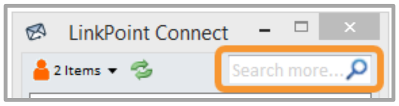


A **Contact List:** All contacts included in the To, From, Cc, and Bcc fields for the selected email are listed and available for reference. Select one from the list to view the Microsoft Dynamics CRM information for that record within the LinkPoint Connect Side Panel.



B

Search Bar: Enter the name of any Microsoft Dynamics CRM contact and press **Enter** to search for and view the CRM information for that record within the LinkPoint Connect Side Panel.



Tip: If you are looking for a Microsoft Dynamics CRM contact but cannot remember the name, try searching for the Account or Opportunity. The LinkPoint Connect Side Panel will return all of the matching contacts from the search results under the Contact List for you to choose from.

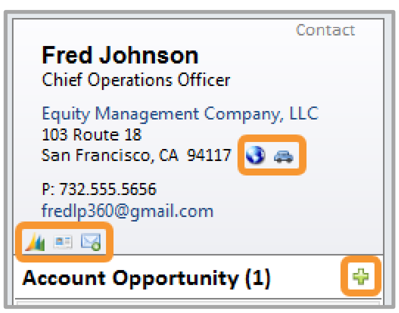
C

Business Card: View basic information related to the contact such as Contact Name, Job Title, Company, Telephone Number, and Email Address.

Tip: You can click the account name within the Business Card to launch the account record in Microsoft Dynamics CRM. You can click the email address in the Business Card to launch a new email window within IBM Notes.

D

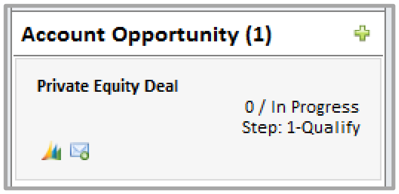
Shortcut Icons: Choose how to act on the data presented in the Side Panel using icons that make it quicker to work with.



Icon	Action
	Displays the contact's address in Google Maps
	Displays driving directions
	Opens the record in Microsoft Dynamics CRM
	Copies the current record to the email address book
	Records the selected email to the contact in Microsoft Dynamics CRM
	Creates a new item based on the related information

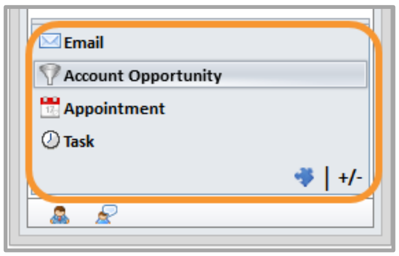
E

Related Information: Review data from Microsoft Dynamics CRM that relates to the selected contact. View emails, accounts, opportunities, cases, and custom objects by selecting items in the **Navigation Pane.**



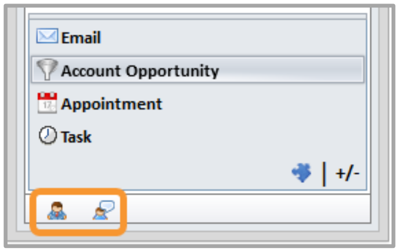
F

Navigation Pane: Select the Related Information to display for a specific contact.



G

Drop Zone: Create new contacts, leads, or accounts by highlighting an email signature, clicking down on the selection, and then dragging and dropping the content on one of the icons.



3

Double click on items listed within the Related Information section of the Side Panel to preview the Microsoft Dynamics CRM content within IBM Notes.

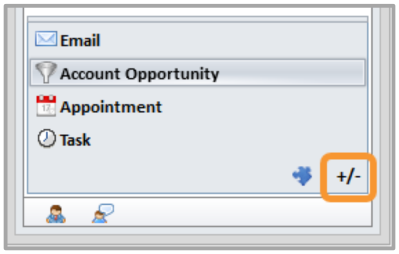
4 Scroll through the content in the Quick View window. Click the arrows to move between Microsoft Dynamics CRM items.

5 Click the red X in the top right corner of the window or click anywhere on screen outside of the Quick View window to close it.

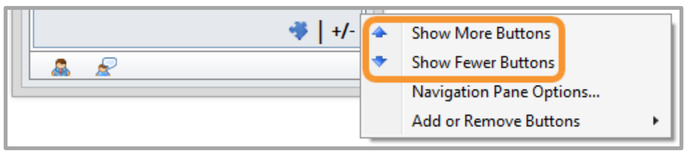
Enabling and Disabling LinkPoint Connect Side Panel Navigation Pane Items

LinkPoint Connect offers users the flexibility to choose which items appear within the Side Panel in IBM Notes. This section will demonstrate how to add, remove, and rearrange the content displayed in the Side Panel.

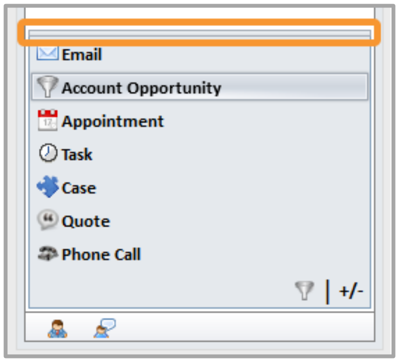
1 Navigate to the LinkPoint Connect Side Panel, and click the **+/-** icon in the bottom right of the **Navigation Pane**.



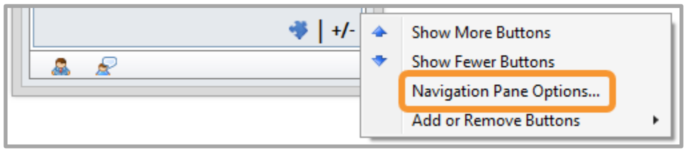
2 Select the option to **Show More Buttons** to add to the list of items available in the Navigation Pane. Select **Show Fewer Buttons** to reduce the number of items available.



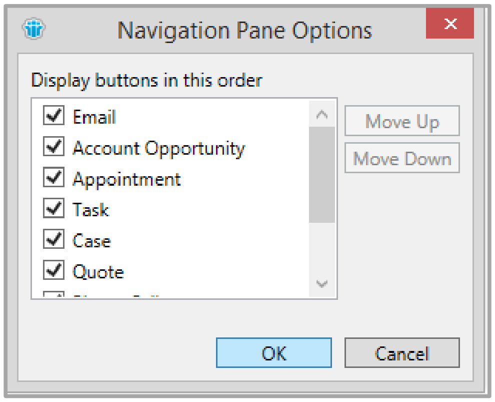
Tip: You can also click and drag the top of the Navigation Pane to increase or decrease the size of the pane. This will automatically show or hide buttons.



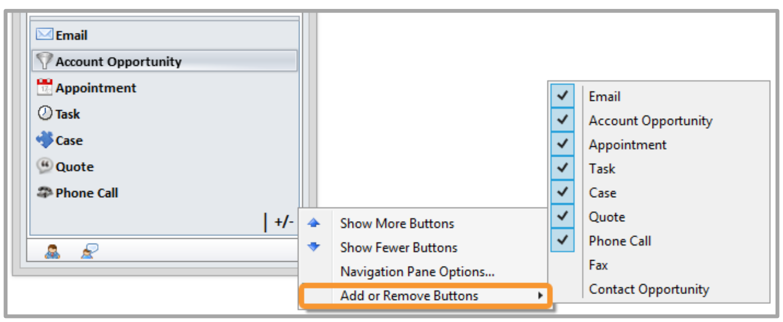
3 Select **Navigation Pane Options…**



4 Choose the items to display in the Navigation Pane by selecting or deselecting the checkboxes in the **Display buttons in this order** list. Select an item and click the **Move Up** and **Move Down** buttons to change the order that the items appear in the Navigation Pane. Click **OK** to save changes or **Cancel** to discard them.



5 Select **Add or Remove Buttons** to see a quick view of available options for the Navigation Pane. Click items with a checkmark to deselect them and remove them from the Navigation Pane. Click items without checkmarks to add them to the Navigation Pane.



Tip: The configuration options mentioned in this section are based on the standard out-of-the-box settings for LinkPoint Connect. If you do not have these settings available, it is possible that they have been disabled by your internal IT admin.

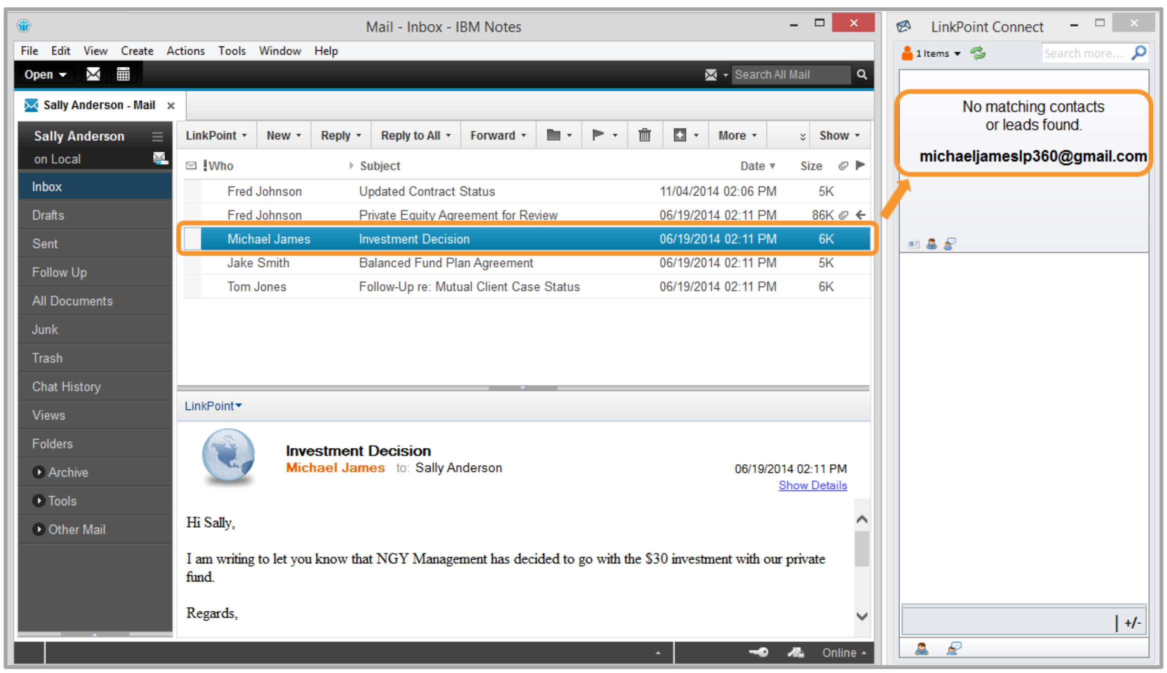
Creating Microsoft Dynamics CRM Records from IBM Notes

Creating a New Microsoft Dynamics CRM Contact from IBM Notes

LinkPoint Connect promotes CRM adoption by offering a variety of shortcuts to encourage users to add new contacts, opportunities, and accounts to Microsoft Dynamics CRM. This can be done easily from IBM Notes.

Tip: Depending on how an organization has configured LinkPoint Connect to mirror your existing business processes, users may not have all of the options described in the following section. Contact your admin for more information.

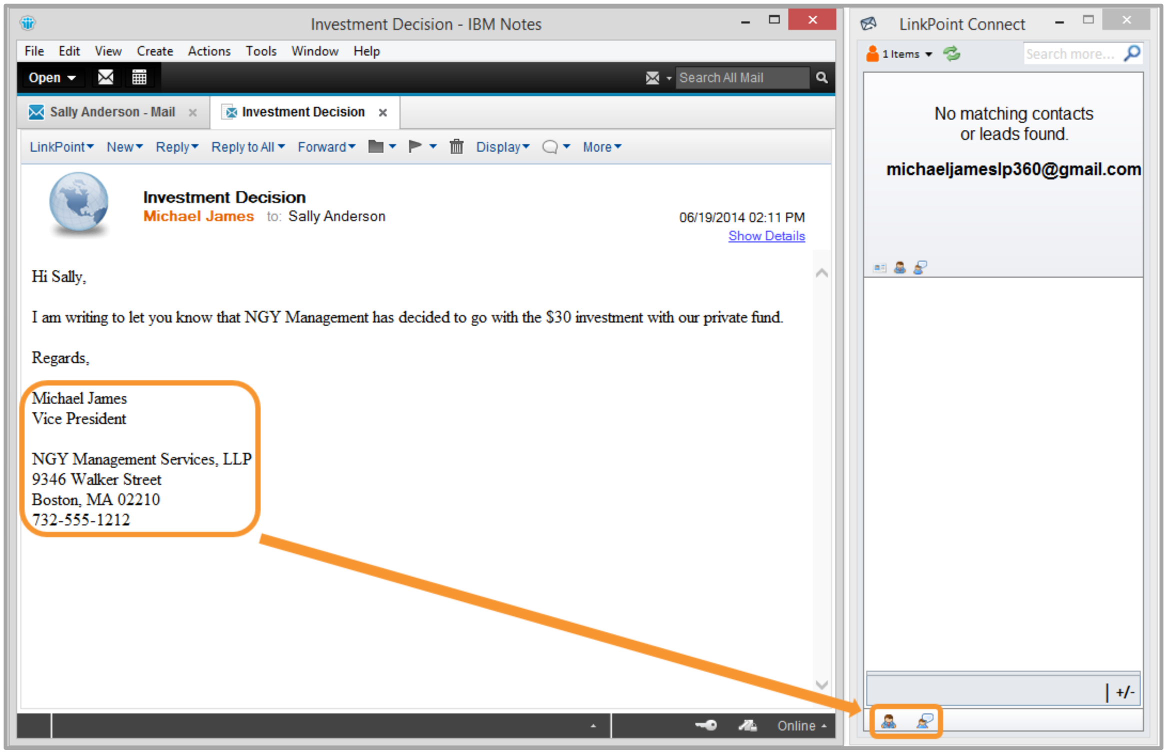
1 Select an email from a new contact. Note that the LinkPoint Connect Side Panel searched Microsoft Dynamics CRM for the contact and was unable to return a record matching the sender's email address.



Tip: LinkPoint Connect searches for contacts based on primary email address. If you receive an email from an existing contact and the LinkPoint Side Panel does not return a matching contact, it is possible that the contact may be in Microsoft Dynamics CRM under a different or secondary email address. You can verify before creating a new contact by using the Search Bar in the LinkPoint Connect Panel to look for the contact by First and/or Last Name.

Additional Resources: LinkPoint360 can customize the Search Bar to include results from custom fields including secondary email addresses. Please contact the LinkPoint360 Support Team for more information.

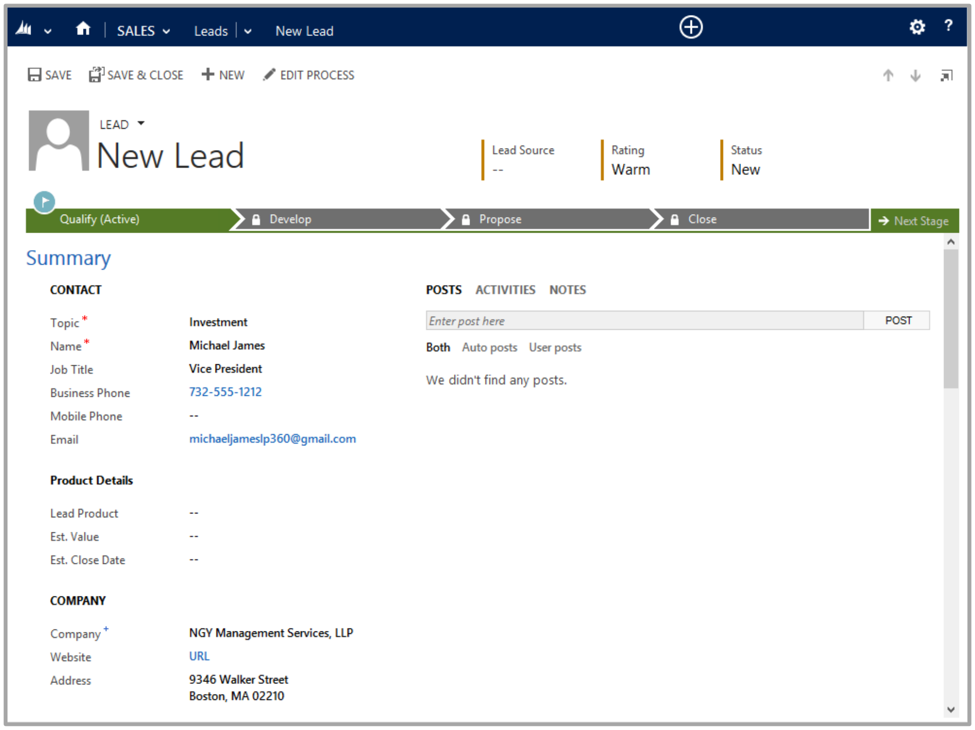
2 Highlight the signature within the email. Drag and drop the highlighted signature to the Drop Zone at the bottom of the LinkPoint Connect Side Panel. Release the selection over the contact type you want to create. This will launch Microsoft Dynamics CRM in your Internet browser.



Tip: Users can create new Contacts or Leads by releasing the email signature over the corresponding icon in the Drop Zone.

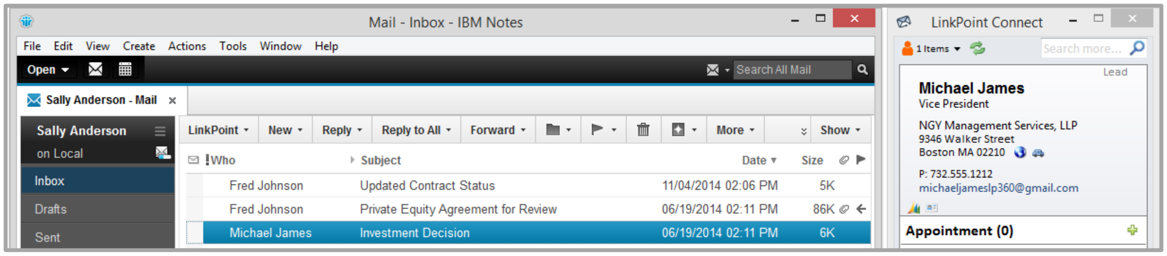
Icon	Action
	Creates a new Contact in Microsoft Dynamics CRM
	Creates a new Lead in Microsoft Dynamics CRM

3 Enter any required or additional information to the Microsoft Dynamics CRM Lead or Contact record. Note that some fields, such as First Name, are prepopulated within Microsoft Dynamics CRM by LinkPoint Connect. Click **Save** to create the record.



Tip: LinkPoint Connect will not override any existing business rules within your instance of Microsoft Dynamics CRM. If additional fields are required as part of the contact creation, the user will need to enter the information in order to proceed.

4 Return to IBM Notes and select the email from the new contact. Note that the LinkPoint Connect Side Panel now displays the contact information from Microsoft Dynamics CRM.

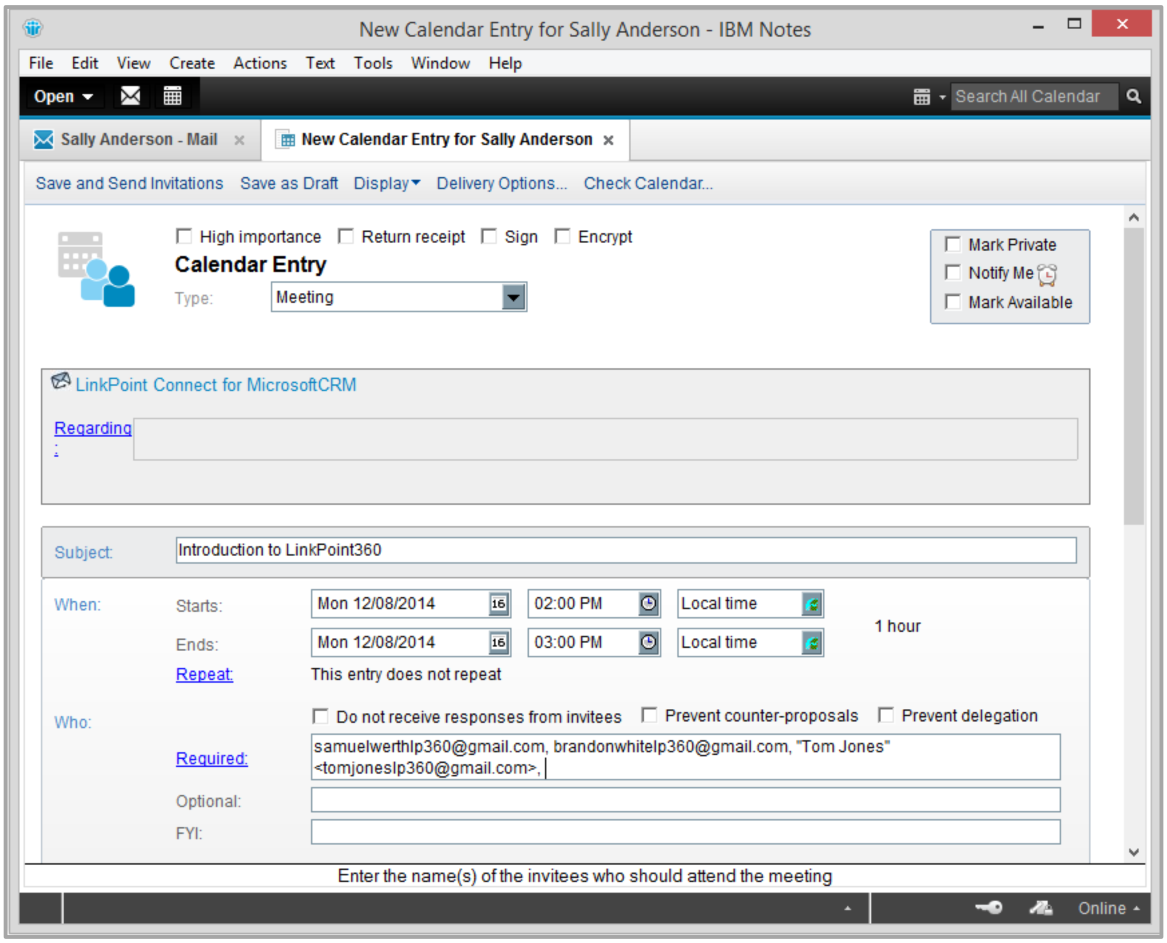


Relating a New IBM Notes Calendar Item to an Existing Microsoft Dynamics CRM Record

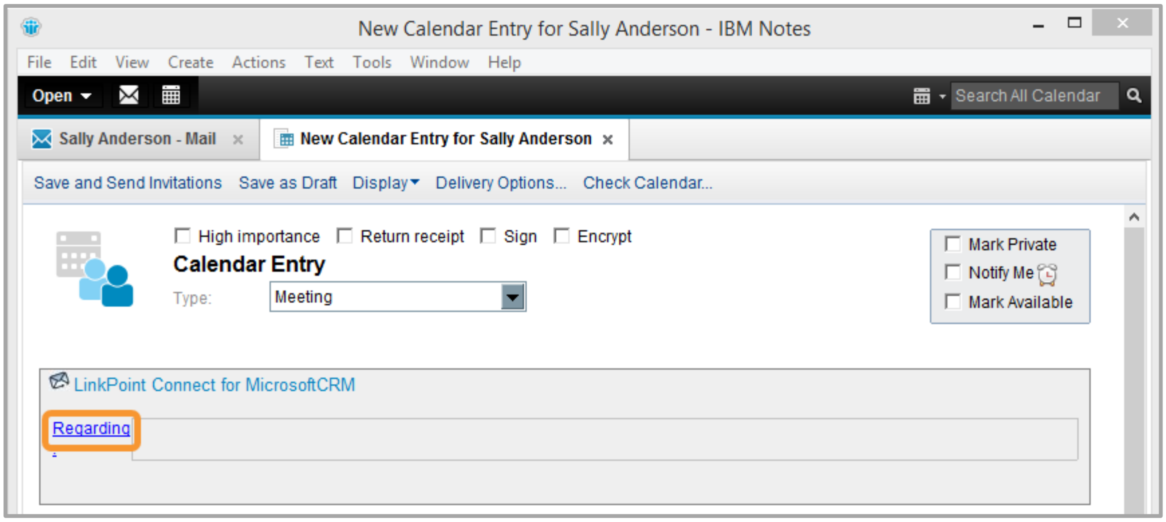
LinkPoint Connect promotes CRM adoption by offering a variety of shortcuts to encourage users to add new contacts, opportunities, and accounts to Microsoft Dynamics CRM. This can be done easily from IBM Notes. In this section, you will learn how to relate new calendar items such as Meetings and Appointments in IBM Notes to existing Microsoft Dynamics CRM accounts.

Example: In this example, we will demonstrate how to relate Meetings to existing Microsoft Dynamics CRM records.

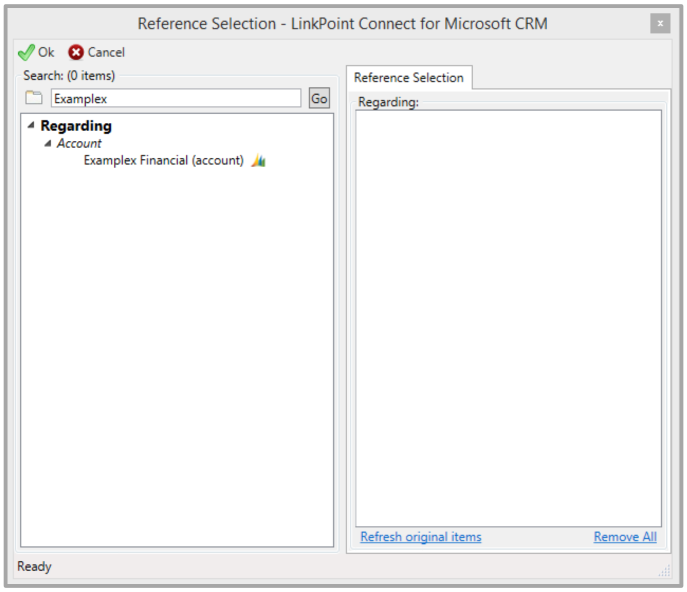
1 Open the **New Meeting** screen in IBM Notes and enter information for the meeting including the attendees, subject, location, date, time, and content.



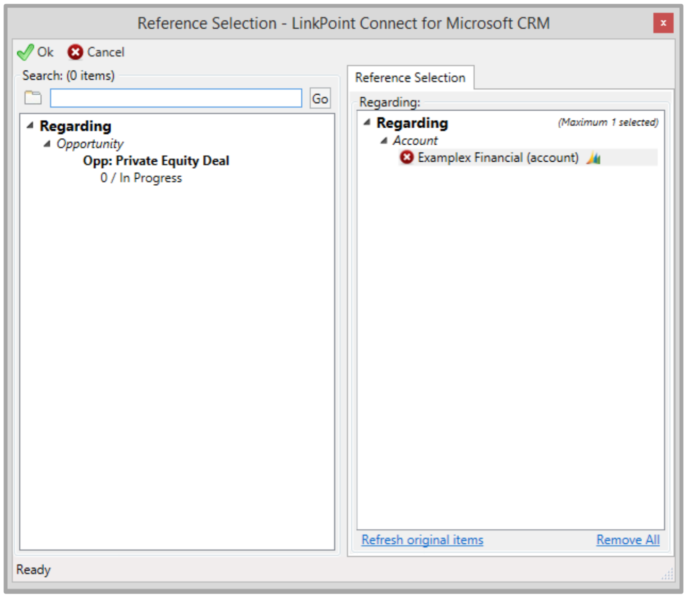
2 Select the **Regarding** link in the **LinkPoint Connect for Microsoft CRM** section of the new meeting.



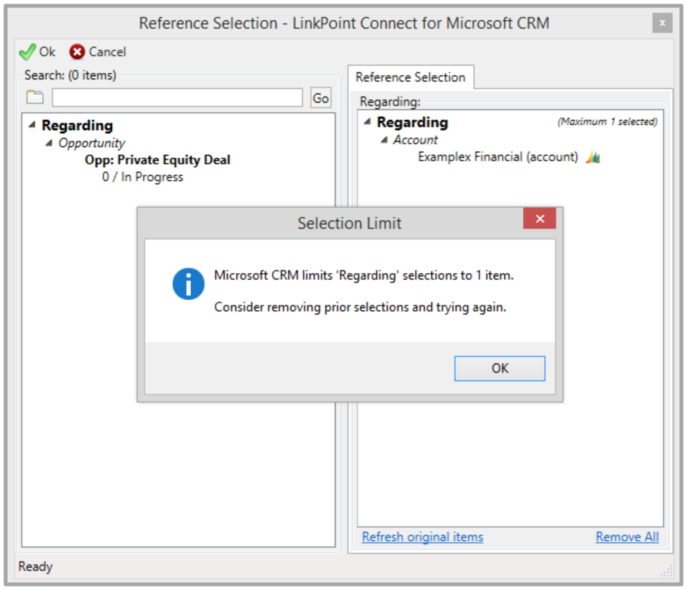
3 Search for the contact, account, or other record to relate with the new meeting. Enter partial or full search terms in the **Search** field and click the **Go** button. Review the list of search results on the left pane.



4 Double click items on the left pane or click the green arrow to add them to the **Regarding** pane. Double click items on the **Regarding** pane or click the red x to remove them. Click the **Ok** button to continue.

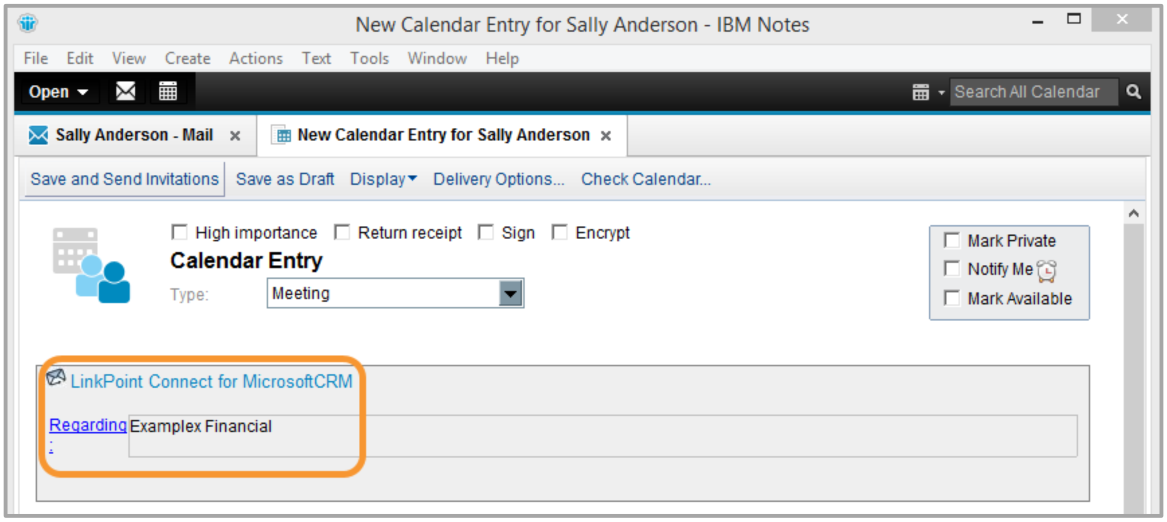


Tip: Microsoft Dynamics CRM limits the number of items that users can relate to CRM records at a time. If you try to select more than one Regarding item, LinkPoint Connect will remind you of the selection limit.



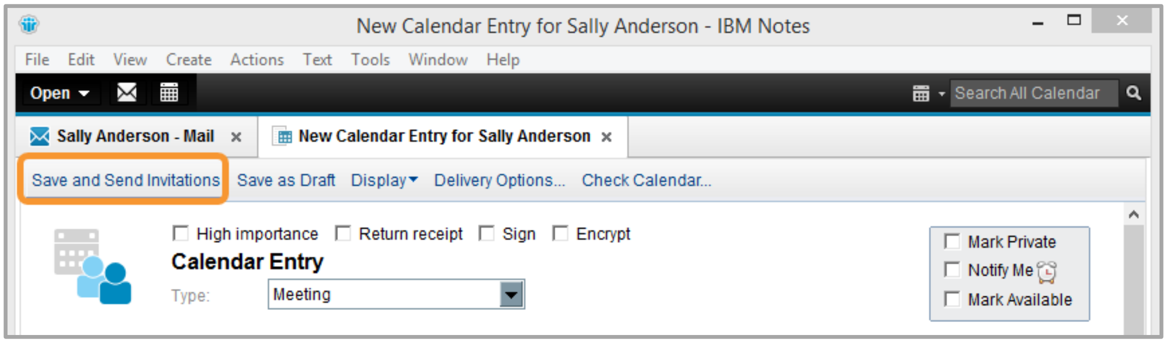
5

Note that there are now records listed in the **Regarding** section of the new meeting.



6

Finish creating the new meeting and then click the **Send** button to create the meeting and send it to the listed recipients. LinkPoint Connect will sync the new meeting to your calendar in Microsoft Dynamics CRM during the next scheduled or manual sync depending on your settings. The new meeting will also be added to the selected records in Microsoft Dynamics CRM.

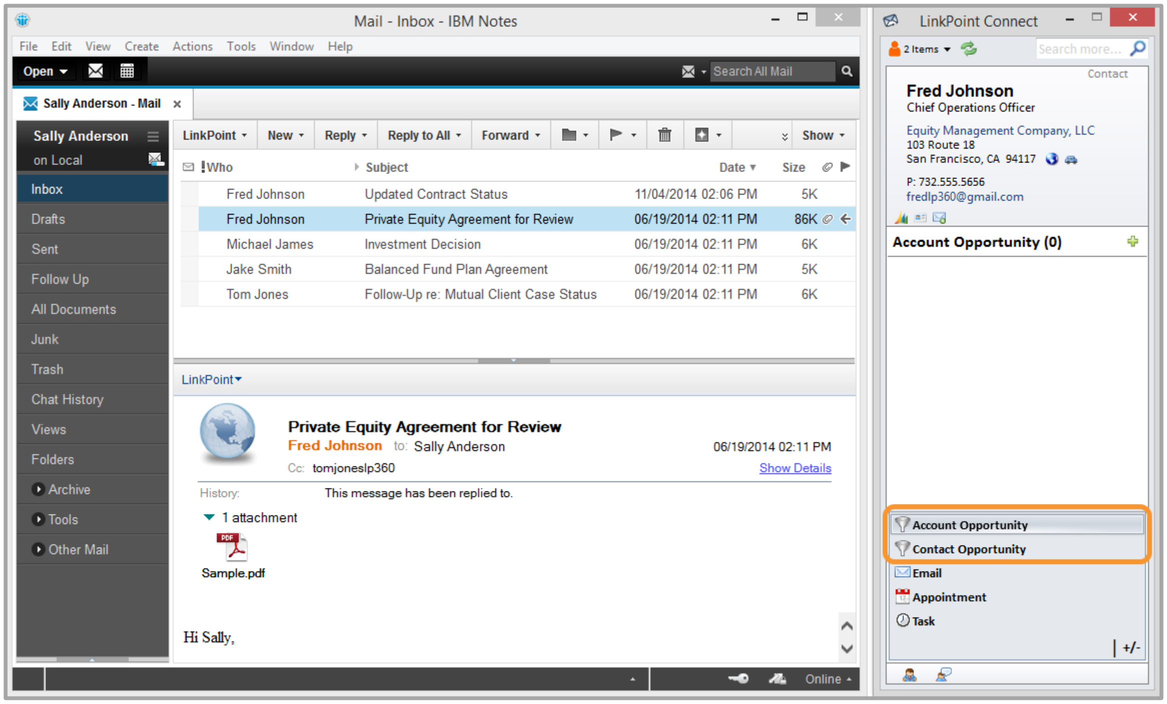


Creating a New Microsoft Dynamics CRM Opportunity from IBM Notes

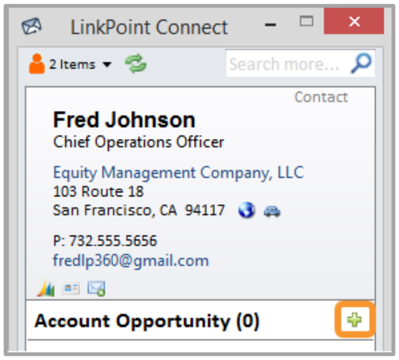
LinkPoint Connect promotes CRM adoption by offering a variety of shortcuts to encourage users to add new contacts, opportunities, and accounts to Microsoft Dynamics CRM. This can be done easily from IBM Notes.

Tip: Depending on how an organization has configured LinkPoint Connect to mirror your existing business processes, users may not have all of the options described in the following section. Contact your admin for more information.

1 Select an email and note that the LinkPoint Connect Side Panel displays the related contact information. Select **Account Opportunity** or **Contact Opportunity** on the Navigation Pane to display the Related Information for the contact.

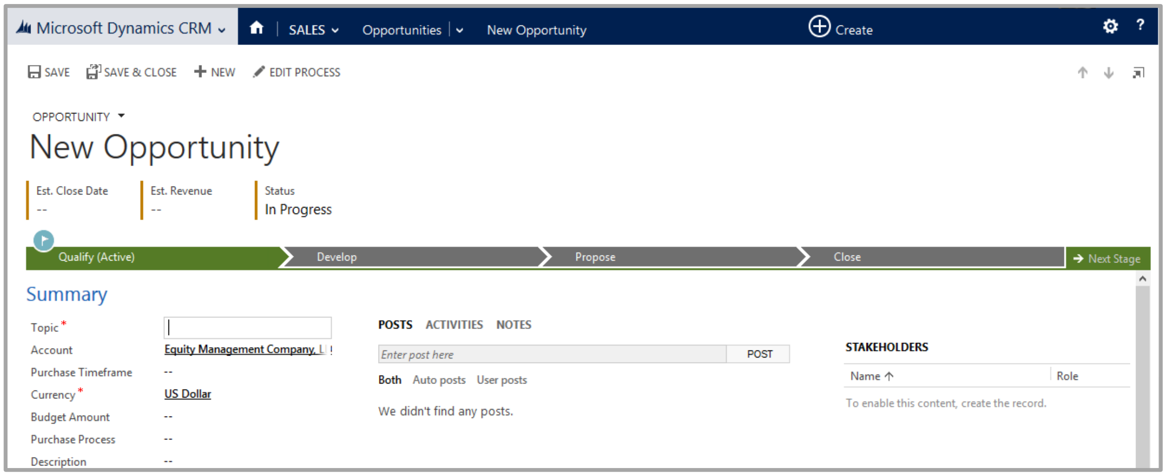


2 Click the **Create a new item** icon to create a new opportunity. This will launch Microsoft Dynamics CRM in your Internet browser.



3

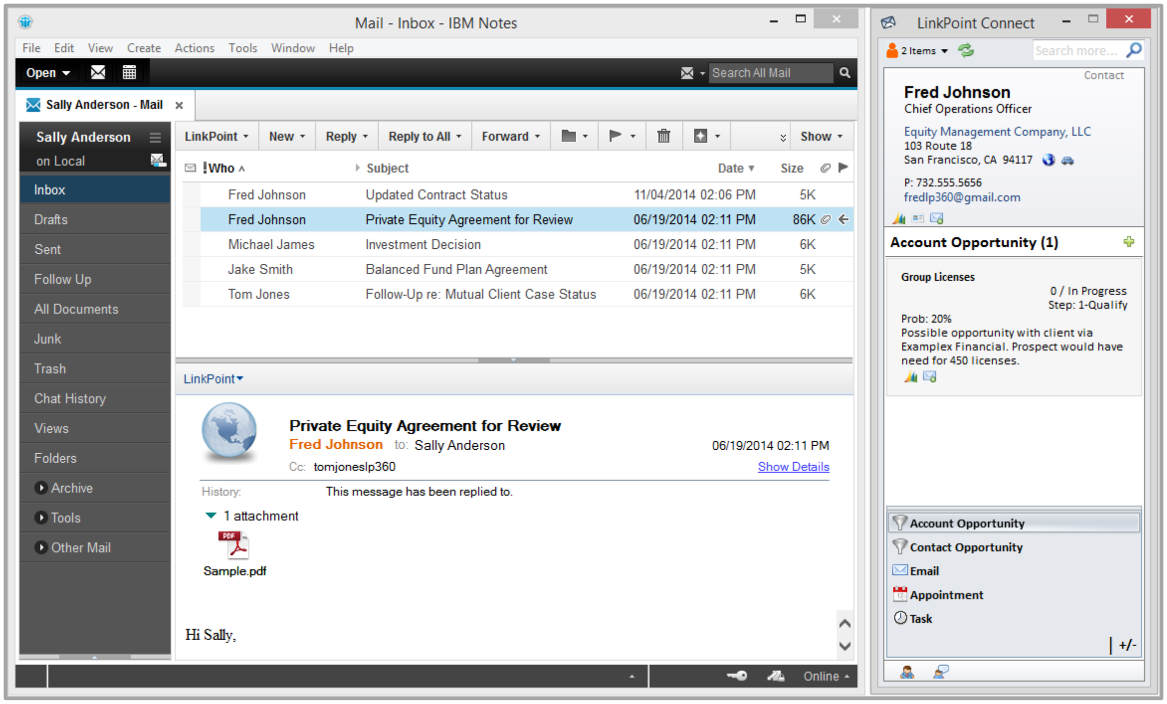
Enter any required or additional information in the Microsoft Dynamics CRM Opportunity record. Note that the Account Name field is prepopulated within Microsoft Dynamics CRM by LinkPoint Connect. Click **Save** to create the record.



Tip: LinkPoint Connect will not override any existing business rules within your instance of Microsoft Dynamics CRM. If additional fields are required as part of the opportunity creation, the user will need to enter the information in order to proceed.

4

Return to IBM Notes and select the email that corresponds with the new opportunity. Note that the LinkPoint Connect Side Panel now displays the new opportunity information from Microsoft Dynamics CRM.

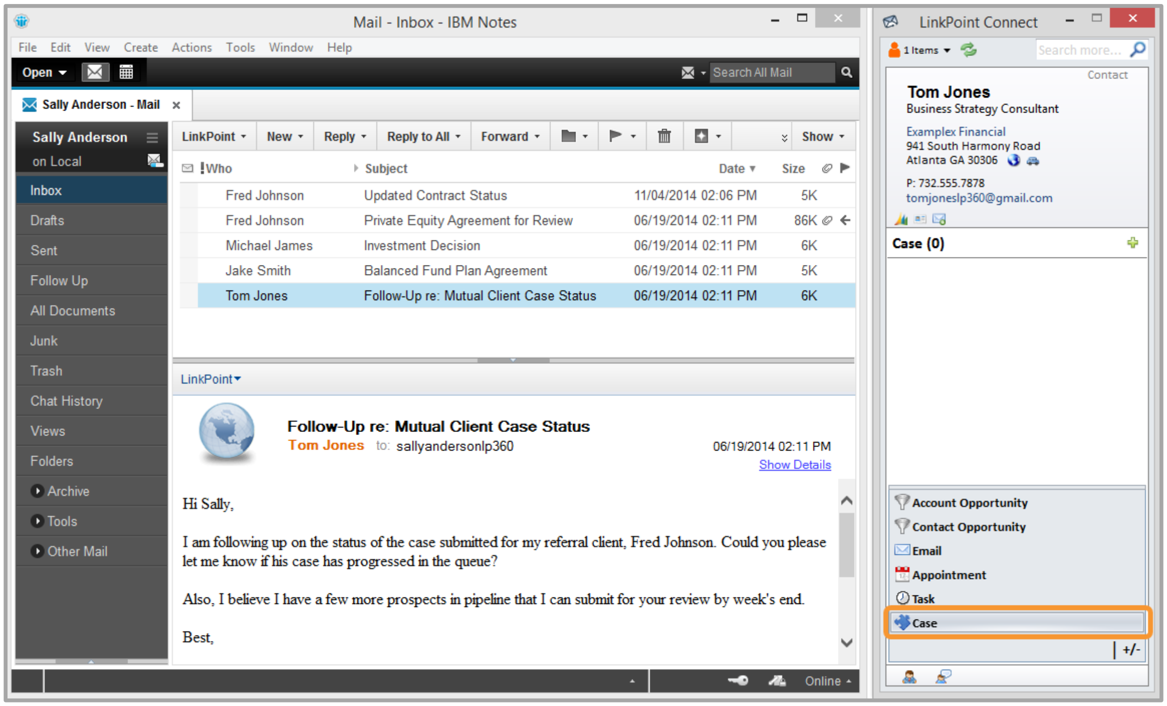


Creating a New Case in Microsoft Dynamics CRM from IBM Notes

LinkPoint Connect promotes CRM adoption by offering a variety of shortcuts to encourage users to add new contacts, opportunities, and accounts to Microsoft Dynamics CRM. This can be done easily from IBM Notes.

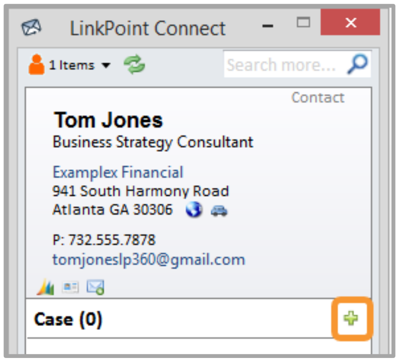
Tip: Depending on how an organization has configured LinkPoint Connect to mirror your existing business processes, users may not have all of the options described in the following section. Contact your admin for more information.

1 Select an email and note that the LinkPoint Connect Side Panel displays the related contact information. Select **Account Case** or **Contact Case** on the Navigation Pane to display the Related Information for the contact.

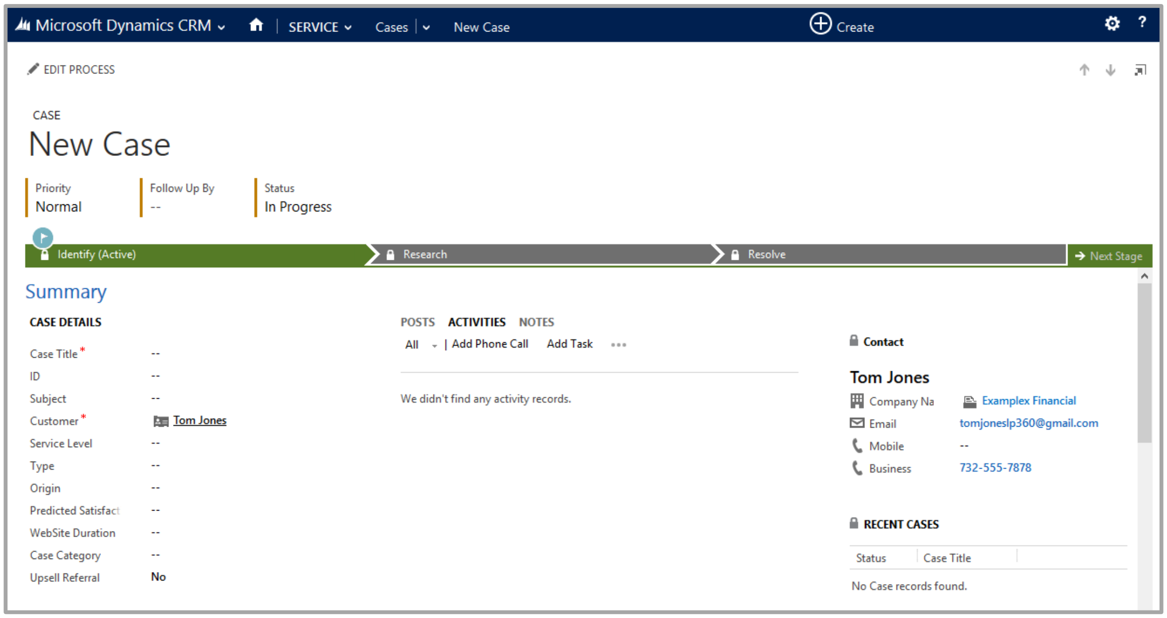


Tip: Organizations can request customizations to modify the case types and information displayed. In some instances, users may not have access to case information or may not see details displayed for specific case types such as closed cases. Please contact the LinkPoint360 Support Team for more information.

2 Click the **Create a new item** icon to create a new case. This will launch Microsoft Dynamics CRM in your Internet browser.



3 Enter any required or additional information in the Microsoft Dynamics CRM Case record. Note that the Customer information is prepopulated within Microsoft Dynamics CRM by LinkPoint Connect.



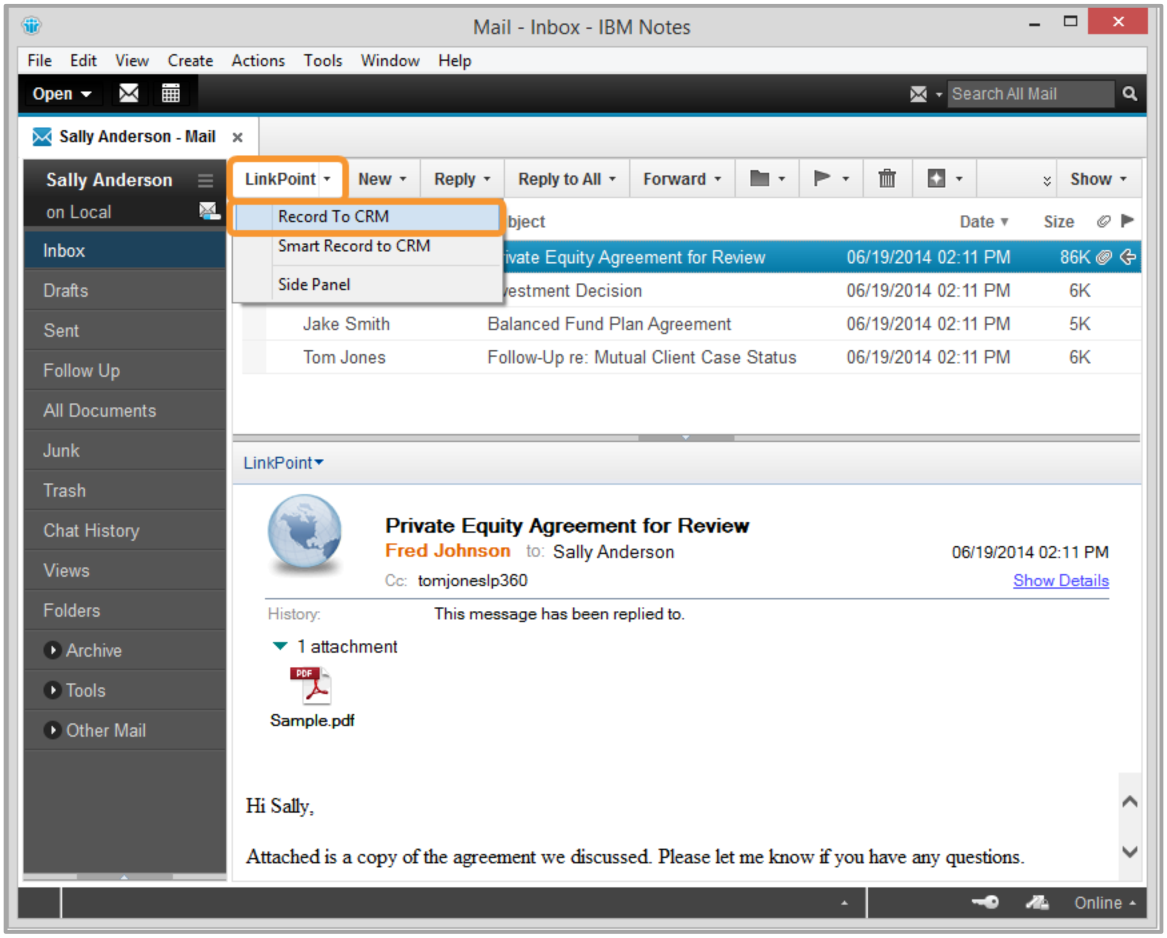
Tip: LinkPoint Connect will not override any existing business rules within your instance of Microsoft Dynamics CRM. If additional fields are required as part of the opportunity creation, the user will need to enter the information in order to proceed.

4 Return to IBM Notes and select the email that corresponds with the new case. Note that the LinkPoint Connect Side Panel now displays the new case information from Microsoft Dynamics CRM.

Recording Emails to Microsoft Dynamics CRM

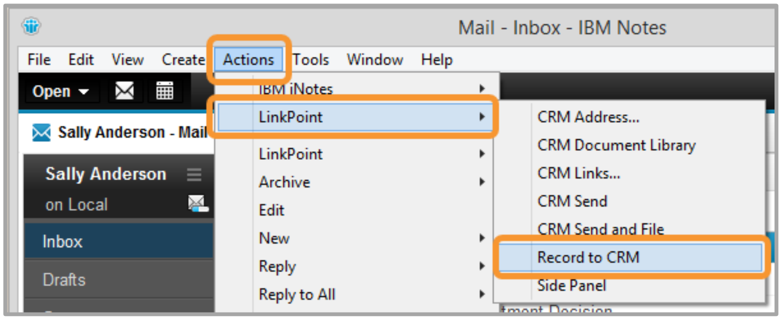
Recording an Email to Microsoft Dynamics CRM from IBM Notes

1 Select an email within the IBM Notes inbox. Select LinkPoint from the IBM Notes toolbar and select **Record to CRM** from the drop-down list.

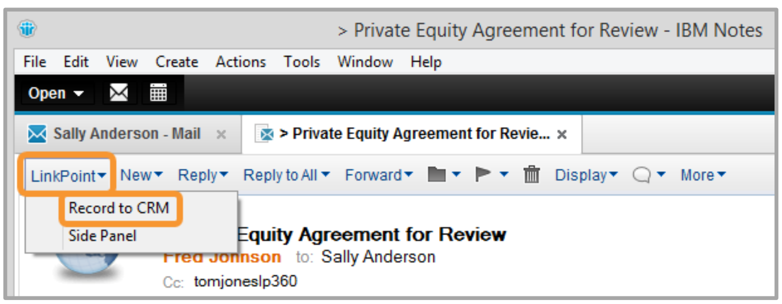


Tip: There are four other ways to access the Record window for LinkPoint Connect. These options may vary depending on how your organization has installed LinkPoint Connect.

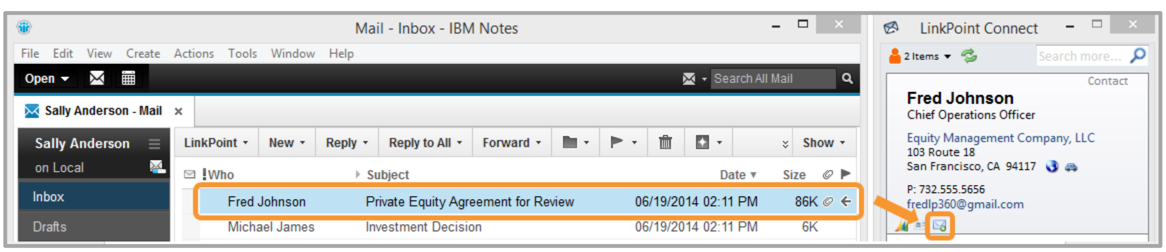
- Select **Actions** from the main menu, select **LinkPoint** from the drop-down menu, and then select **Record to CRM** from the list.



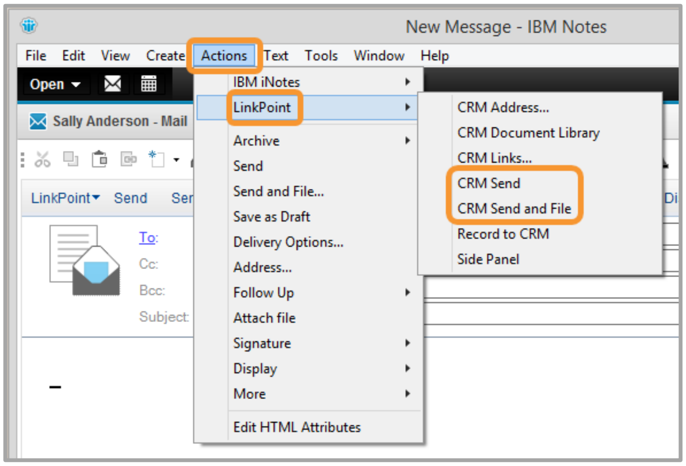
- Within an open email, select **LinkPoint** on the toolbar and select **Record to CRM**.



- Select an inbound email and click the **Quick Record the email to this record** icon on the Side Panel to record the email to the sender's record in Microsoft Dynamics CRM. Note that this method will not record attachments.

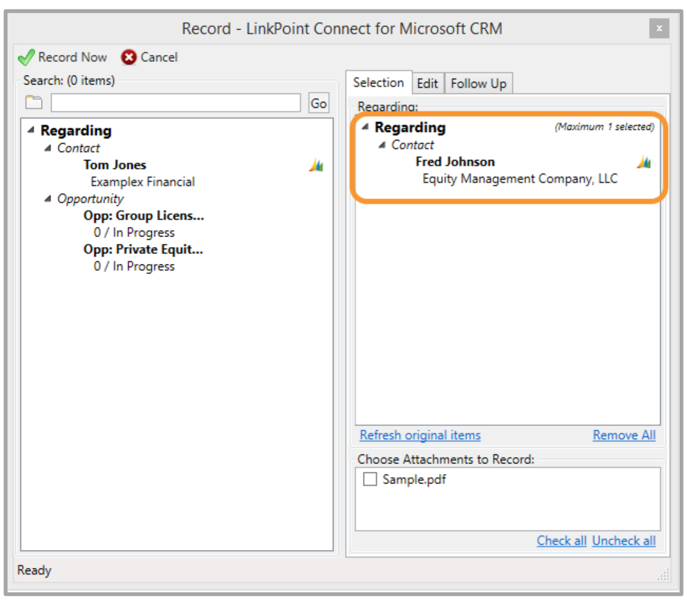


- Create an outbound email. Select **LinkPoint** on the toolbar and select **CRM Send**. Select **CRM Send and File** if you want to be able to file the email to a specific IBM Notes folder when you are finished recording.



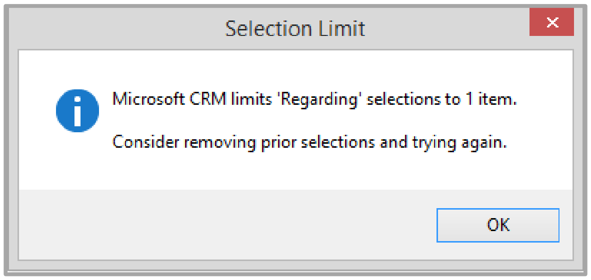
Tip: If you select more than one email in your inbox and then follow the steps to record, the same criteria will be used to record all of the selected emails.

2 Choose the **Contacts** to record the email to within the **Selection** tab in the **Record** window. Review the suggested contacts displayed in the **Record To:** section.

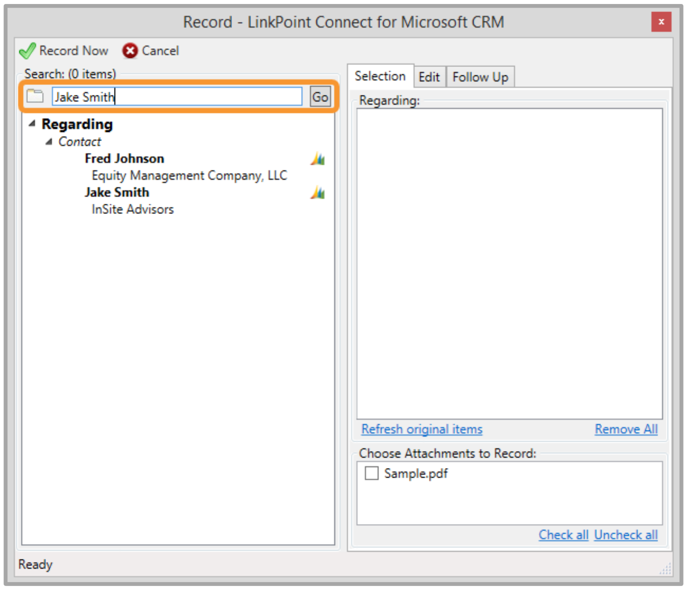


Tip: LinkPoint Connect automatically suggests contacts that appear in Microsoft Dynamics CRM if they are included in the To, From, Cc, or Bcc fields of the email. If there are no matching contacts in Microsoft Dynamics CRM, the Record To section will not display any suggestions.

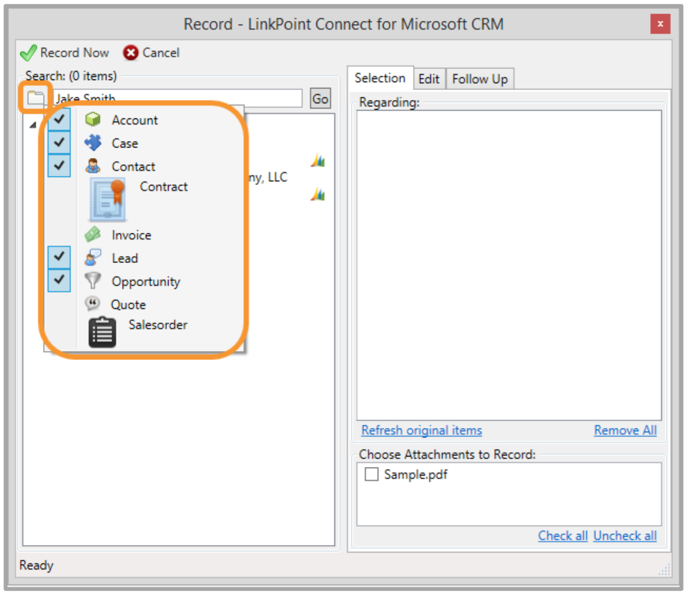
Warning: Microsoft Dynamics CRM does not allow users to take action on more than one Regarding selection at the same time. Try selecting a single item and record the email.



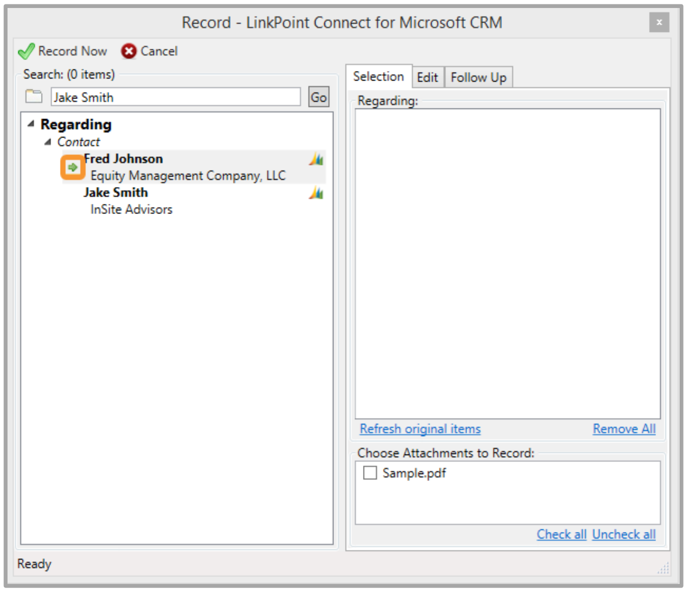
3 Enter text in the search field and click **Go** to search for different contacts to record the email to.



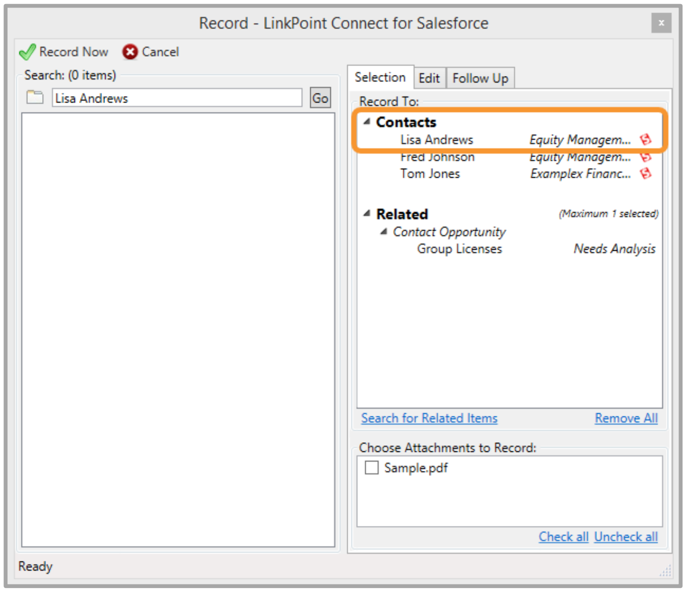
Tip: Click the file folder to the right of the Search bar in the Record window. You can select the object types to include in the search results as options to record to. LinkPoint360 recommends selecting **Account**, **Contact**, and **Lead** so that all contact types are available for search when recording.



4 Review the search results list, mouse over an item, and click the **green arrow** to add the contact to the **Record To** list.



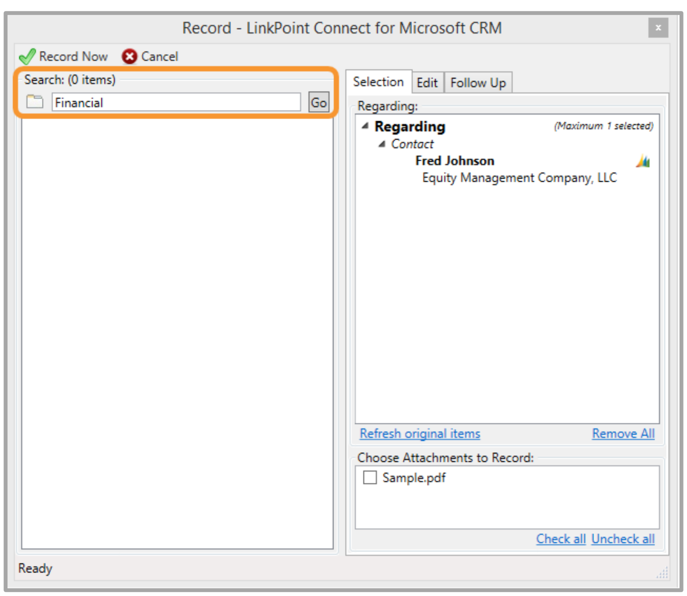
5 Mouse over an item in the **Record To** list and click the **red x** icon to remove it from the list. Note that the removed item will appear on the left side of the Record window.



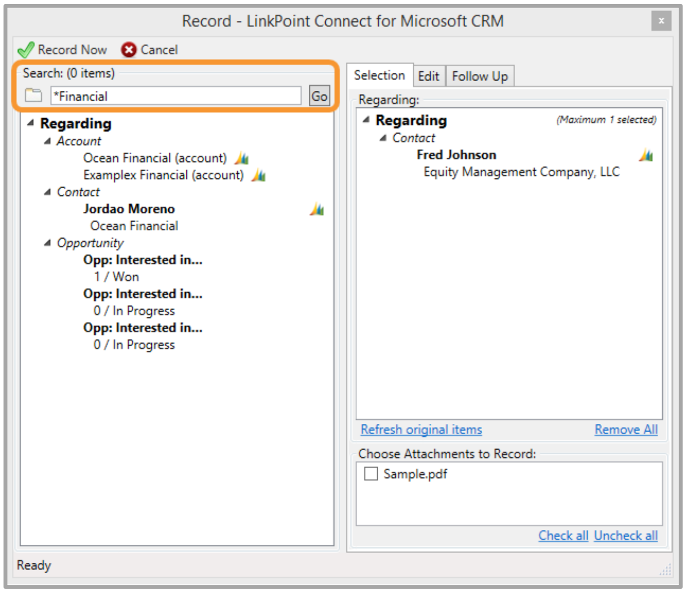
Tip: You can also double click on an item to add or remove it from the Record To section.

Tip: By default, LinkPoint Connect is configured to search based on *Starts with* logic in the Record window. Users can add either ***** or **%** at the start of the search term to perform a *Contains* search.

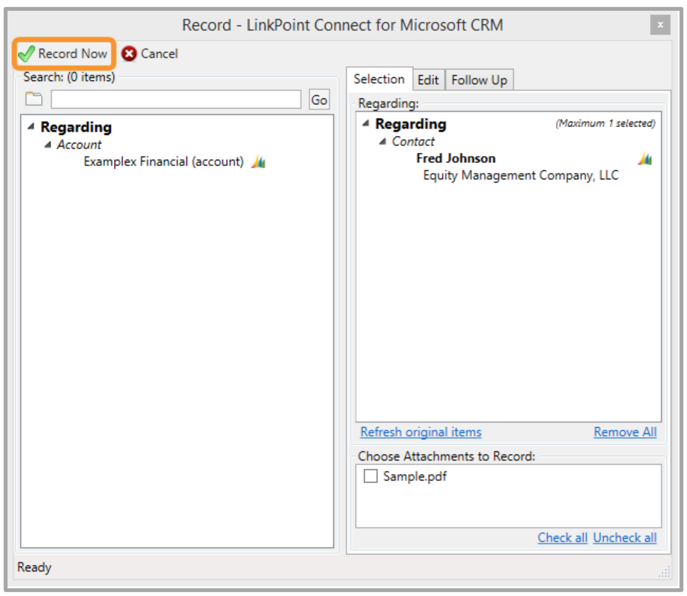
Example: In this example, we want to record an email to an account record. We search for the record using the word *Financial* because we remember the name of the account has the word *Financial* in it. However, the account does not appear in the results because *Financial* is not the first word of the account name.



To find the right account, we search for **Financial*. Now the search returns results for *Examplex Financial*, which is the account we were looking for. Now we can proceed with adding the related items to the Record To window.



6 Click the **Record Now** button to record and send the email, or continue on to the next section in this User Guide.

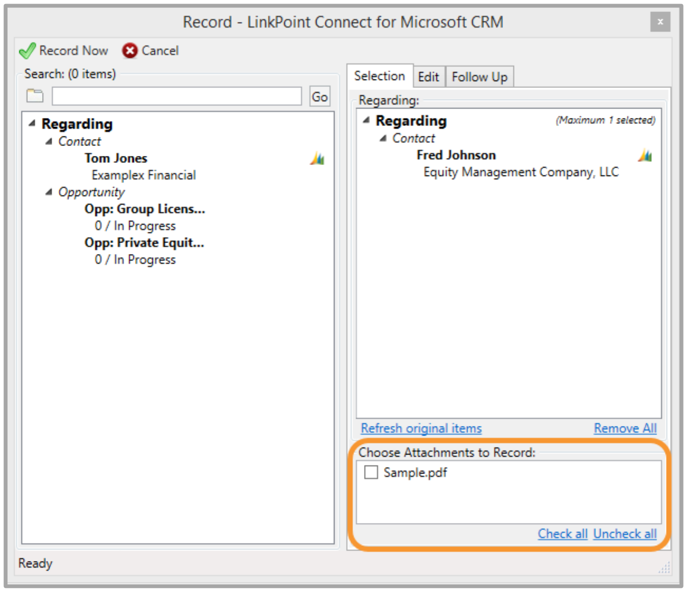


Recording Attachments to Microsoft Dynamics CRM from IBM Notes

LinkPoint Connect promotes CRM adoption with tools designed to make it simple for users to record emails and related content to Microsoft Dynamics CRM without leaving IBM Notes. With flexible configuration settings, users can quickly record emails to contact, lead, account, opportunity, case, or custom object records with just a few clicks.

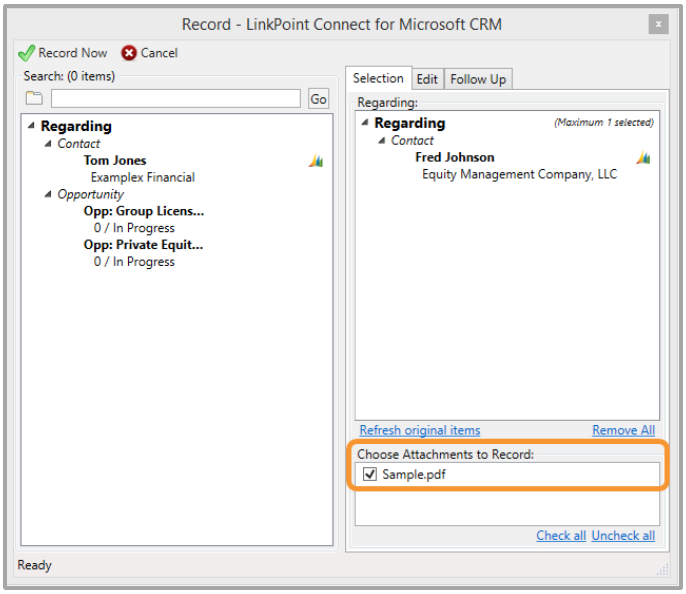
Tip: Recording attachments works the same for both inbound and outbound emails. However, note that attachments are not recorded when using the **Quick Record the email to this record** icon on the Side Panel.

1. Review the **Choose Attachments to Record** section within the **Record** window.



2

Select the checkbox for each attachment to record along with the email.

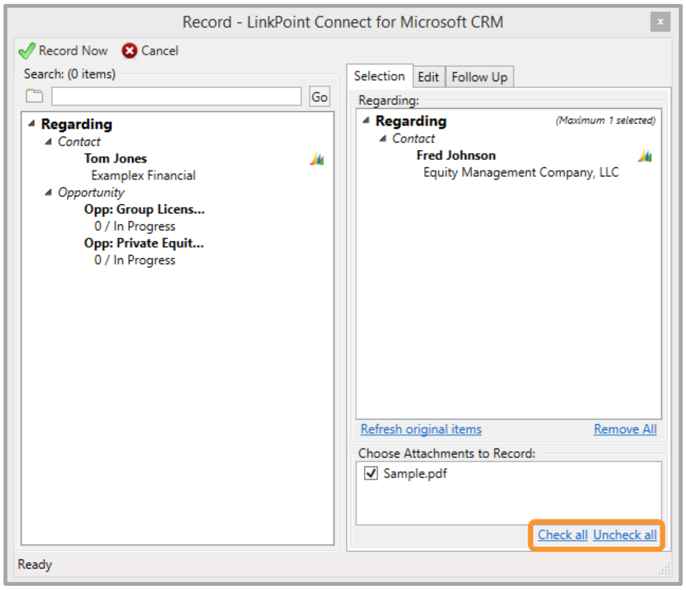


Tip: Attachments are listed but deselected by default in LinkPoint Connect. This gives users the ability to control the items that are recorded to Microsoft Dynamics CRM. Many emails contain graphics, such as social media icons in email signatures, that do not need to be recorded to Microsoft Dynamics CRM.

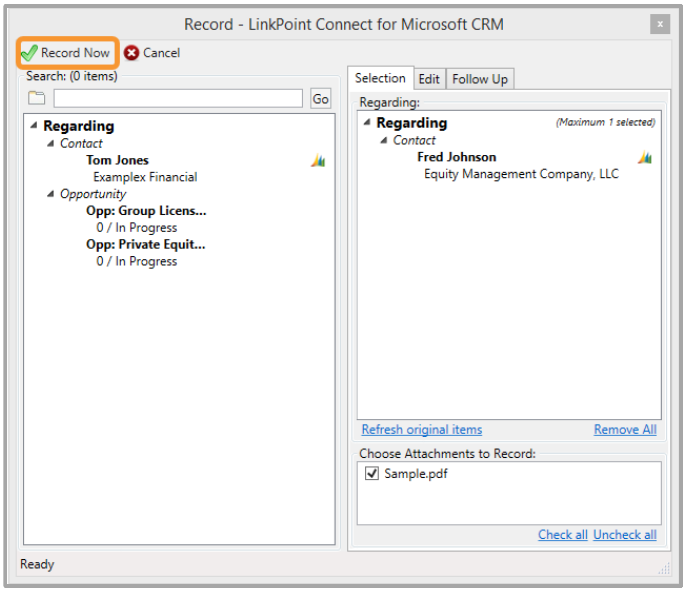
Additional Resource: Refer to the **Configuring LinkPoint Connect Record Functionality** section of this User Guide for more information on configuring default attachment record settings.

3

Select the **Check all** or **Uncheck all** options to select or deselect all of the attachments in the list.



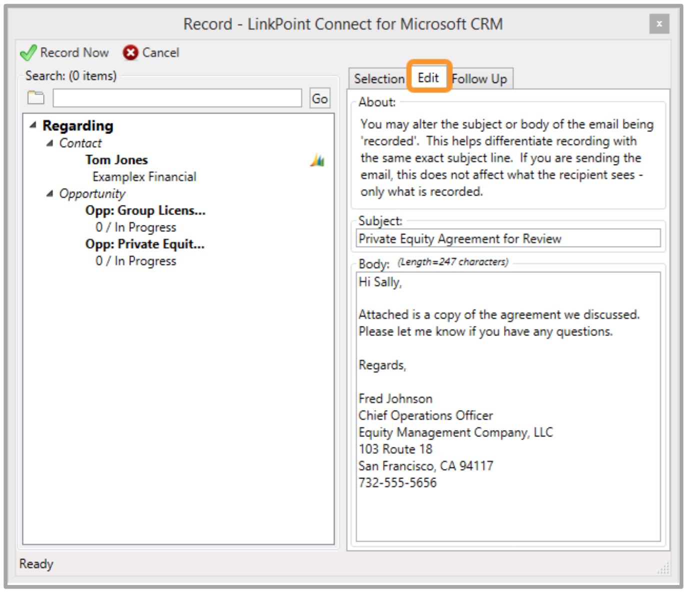
4 Click the **Record Now** button to record and send the email, or continue on to the next section in this User Guide.



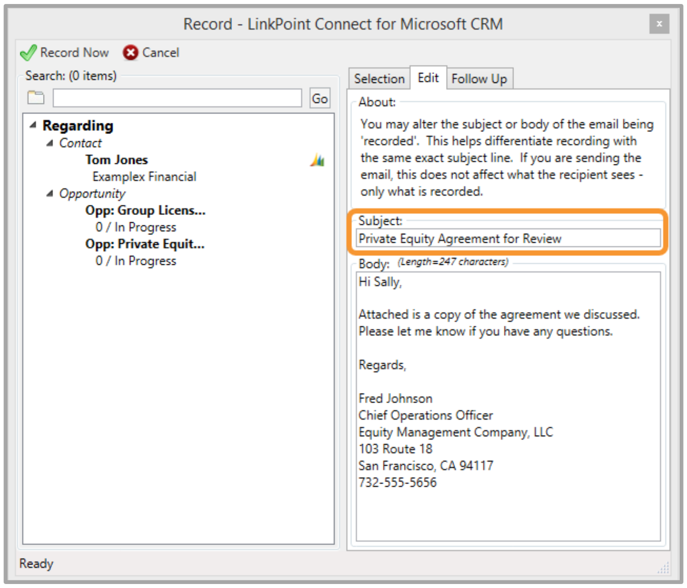
Editing Email Content When Recording to Microsoft Dynamics CRM from IBM Notes

In this article, you will learn how to edit or change the content of the email recorded to Microsoft Dynamics CRM without affecting the email recipient's view of the content.

1. Select the **Edit** tab in the **Record** window.

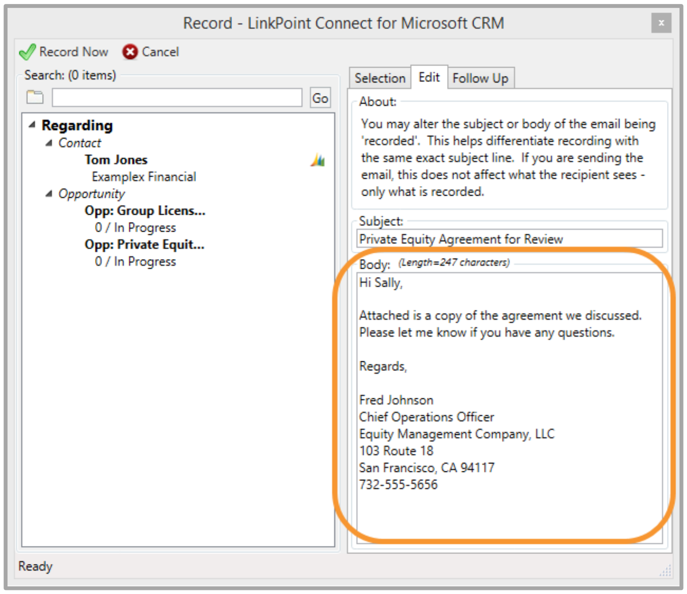


2. Enter or edit the text in the **Subject:** field.



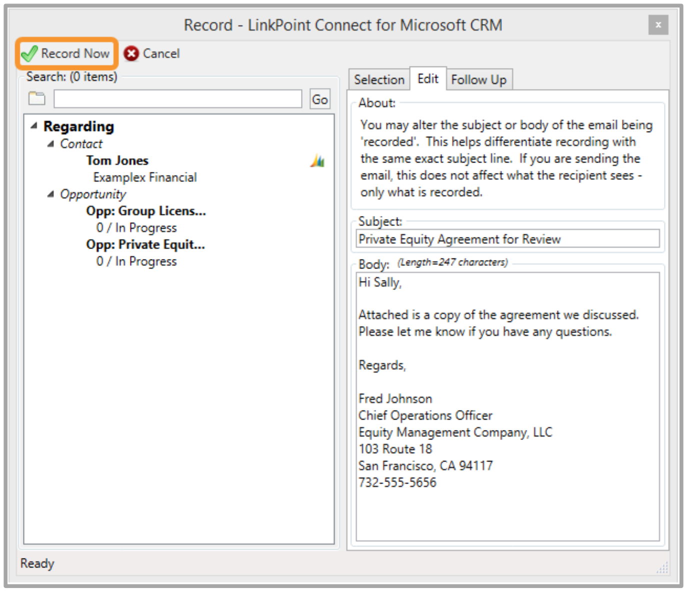
Tip: This field automatically populates with the existing subject of the email. Users can alter the subject of the email to change how it will appear within Microsoft Dynamics CRM to help differentiate it from other recorded emails with the same subject line.

3 Enter or edit the text in the **Body:** field.



Tip: This field automatically populates with the email string. Users can alter the contents of the email to reduce the amount of content recorded, such as removing repetitive messages, email signatures, or personal notes.

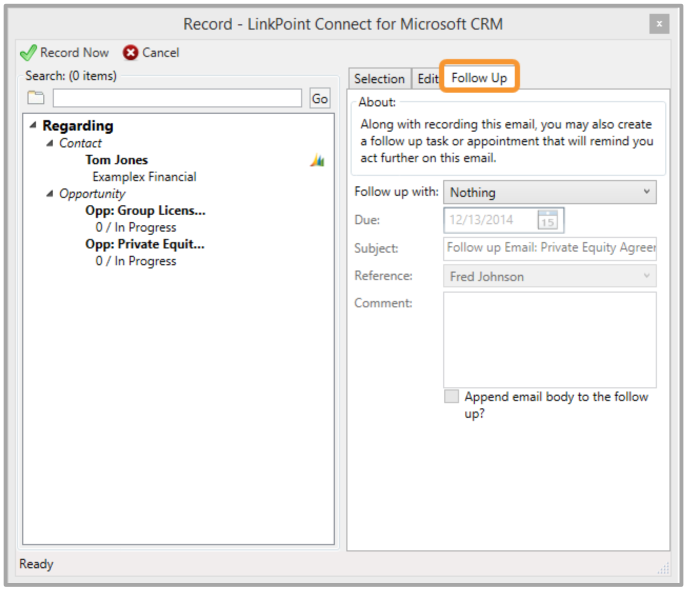
4 Click the **Record Now** button to record and send the email, or continue on to the next section in this User Guide.



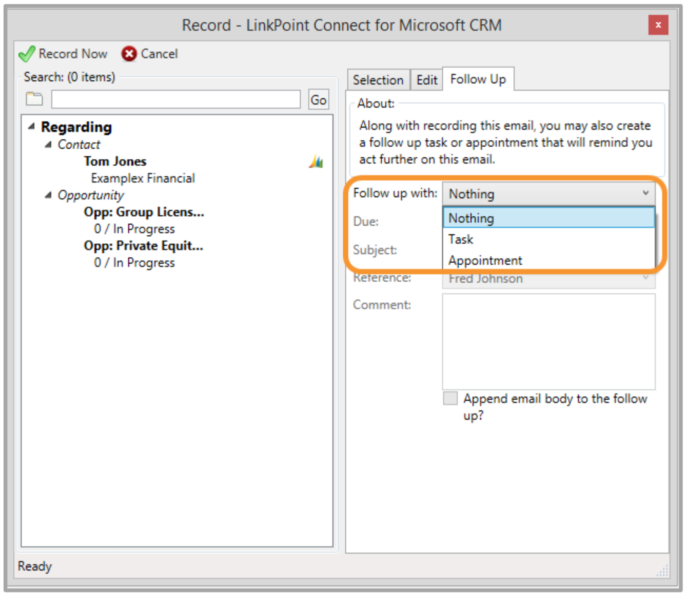
Scheduling Follow Up Actions When Recording an Email

LinkPoint Connect promotes CRM adoption with tools designed to make it simple for users to record emails and related content to Microsoft Dynamics CRM without leaving IBM Notes. With flexible configuration settings, users can quickly record emails to contact, lead, account, opportunity, or custom object records with a few clicks.

1 Select the **Follow Up** tab in the **Record** window.



2 Select an option from the **Follow up with** drop-down list to create either a **Task** or **Appointment**.

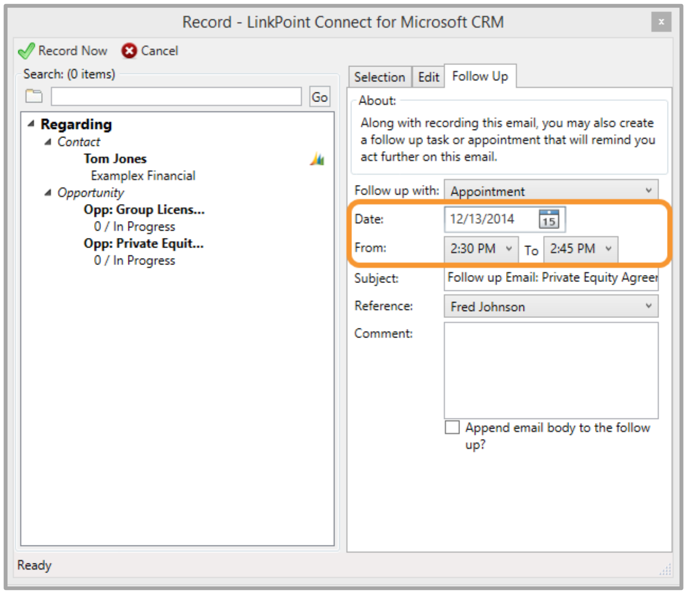


Example: In this example, we will schedule a follow up Appointment. The process is similar for scheduling Tasks. Appointments are typically chosen if the action includes other participants. Tasks are typically chosen if the action is to be completed by a single individual.

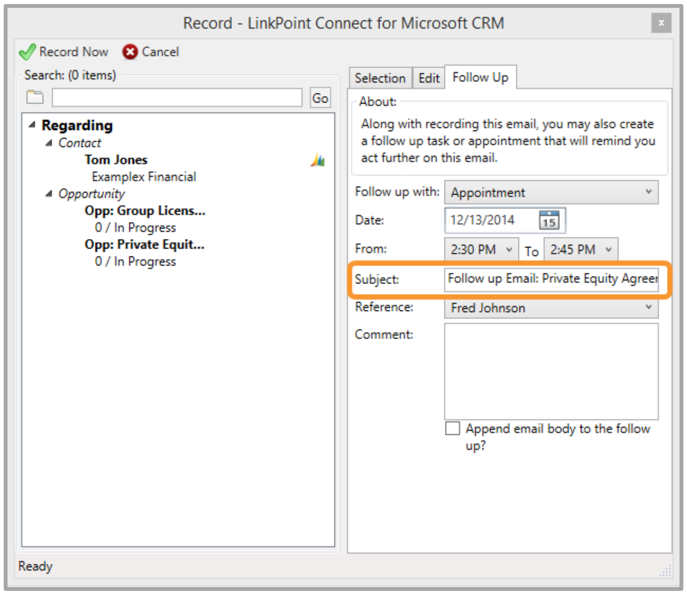
Tip: Follow up options are off by default, and the option for **Nothing** is selected by default. Items will not be added to your calendar unless you enable and schedule the follow up manually.

Additional Resource: Refer to the **Configuring LinkPoint Connect Record Functionality** section of this User Guide for more information on configuring default follow up settings.

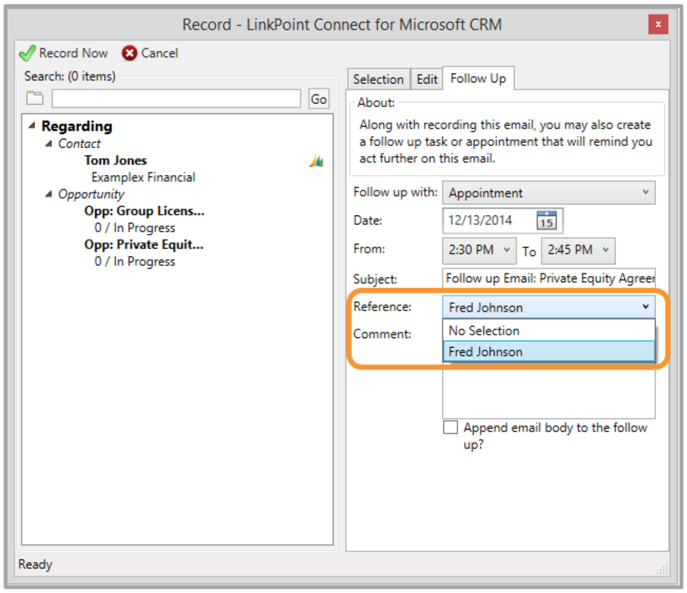
3 Enter the necessary details in the **Date**, **From**, and **To** fields to note when the Appointment will occur.



4 Review the content in the **Subject** field and make any necessary changes. This will name the Appointment on your calendar. Note that LinkPoint Connect prepopulates this field with *Follow up Email:* followed by the subject line of the email.

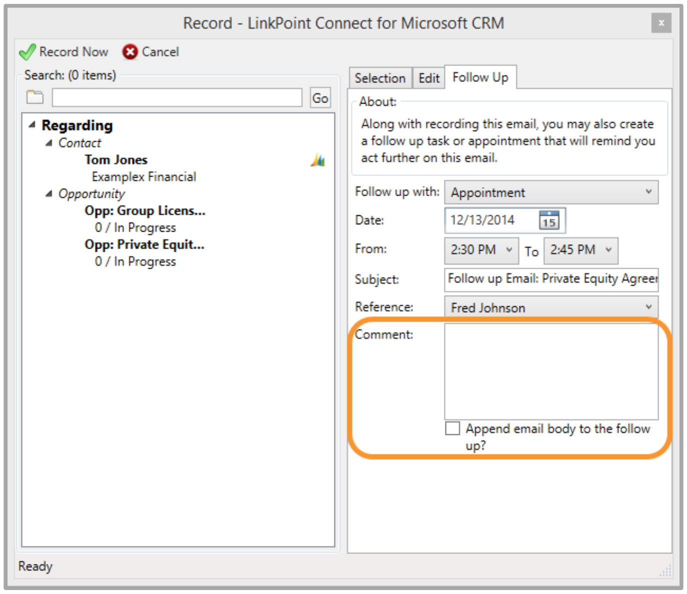


5 Select the contact to associate the Appointment with from the **Reference** drop-down list. This list will include any related contacts that were added to the Selection tab within the Record window.

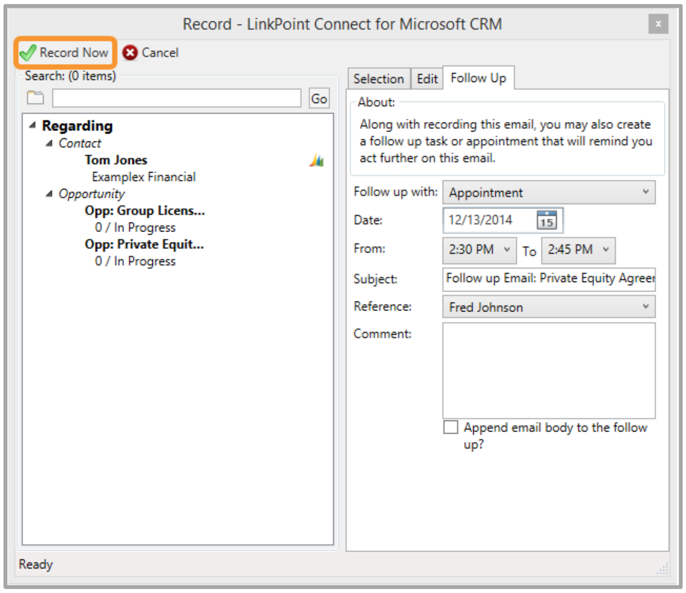


Tip: Selecting a contact to include in the Reference field simply associates the Appointment with their record in Microsoft Dynamics CRM. It does not send a meeting or appointment invitation to the individual.

6 Enter notes regarding the Appointment in the **Comment** field. Select **Append email body to the follow up?** to include the content of the email with the Appointment.



7 Click the **Record Now** button to record and send the email.

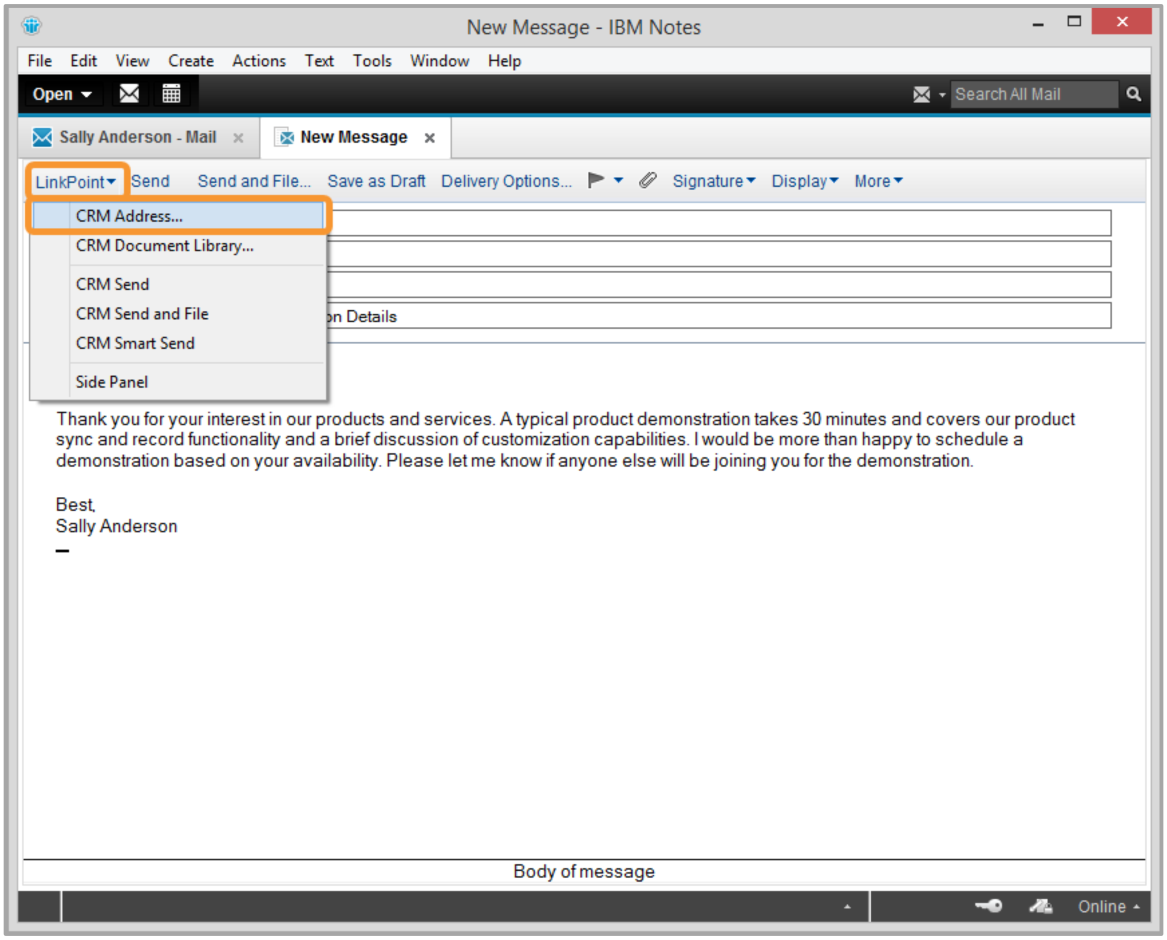


Tip: The newly created follow up item (i.e. Appointment or Task) is created within Microsoft Dynamics CRM and saved to your Microsoft Dynamics CRM calendar as part of the Record process. Depending on your LinkPoint Connect Sync settings, the Microsoft Dynamics CRM calendar item will sync with your IBM Notes calendar.

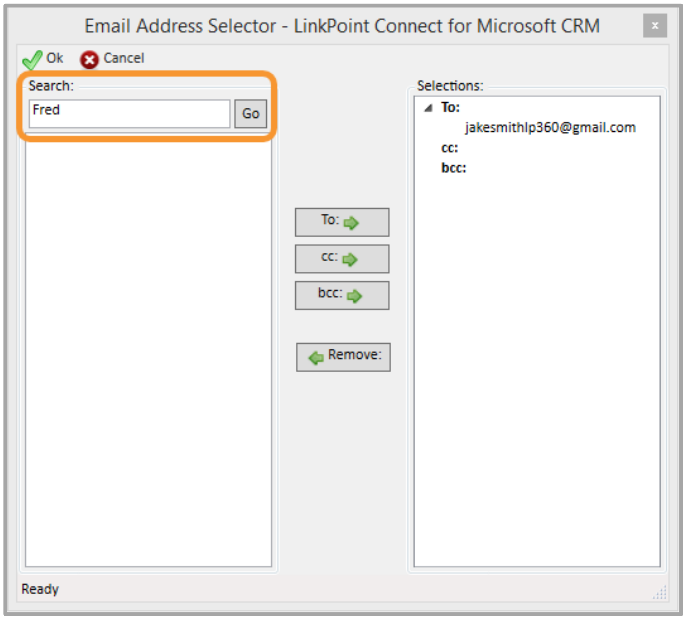
Adding Microsoft Dynamics CRM Contacts as Email Recipients in IBM Notes

LinkPoint Connect provides unique functionality that gives users access to use their Microsoft Dynamics CRM data without leaving IBM Notes. When creating a new email, sending a reply, or forwarding communication, users can easily access their existing Microsoft Dynamics CRM contacts directly within IBM Notes to include additional recipients. In this section, you will learn how to access and use your Microsoft Dynamics CRM contacts when working with outbound emails.

1. Open an outgoing email (either a new or existing email). Select **LinkPoint** from the toolbar, and then select **CRM Address…** from the drop-down menu.



2 Search for Microsoft Dynamics CRM contacts by entering a full or partial contact name, account name, or email address in the **Search** field and click the **Go** button.

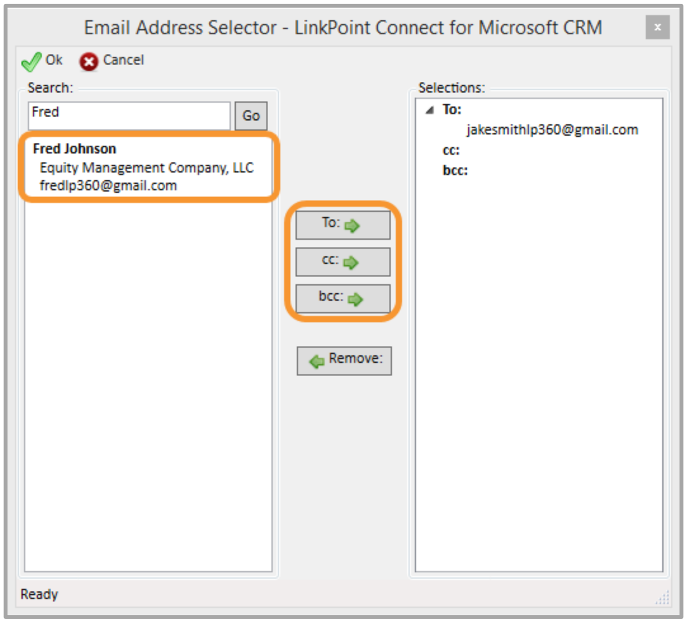


Tip: Any contacts already included in the To, Cc, or Bcc fields of the email will automatically appear within the Selections pane of the Email Address Selector window.

Additional Resources: By default, LinkPoint Connect searches for Microsoft Dynamics CRM contacts based on Account Name, First Name, Last Name, or Email Address. LinkPoint360 can customize the Search Bar to include results from custom fields including secondary email addresses. Please contact the LinkPoint360 Support Team for more information.

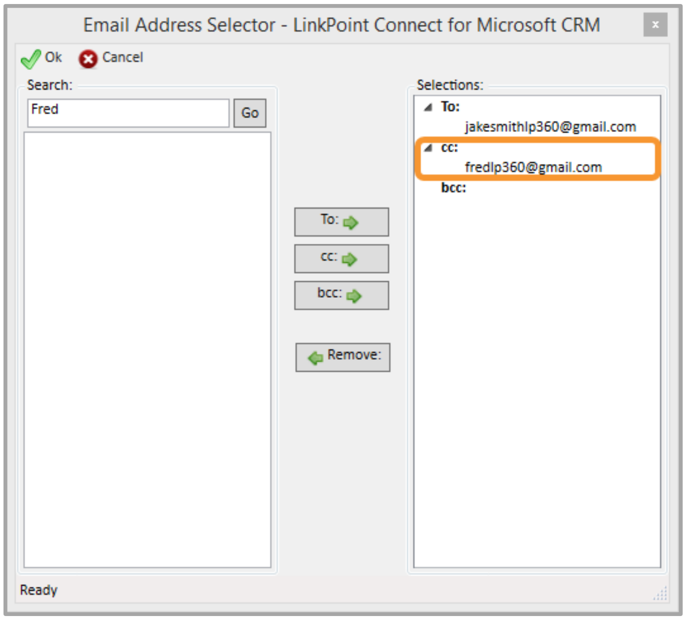
3

Select the relevant contact and click the **To:**, **cc:**, or **bcc:** buttons to add the contact as a recipient.



4

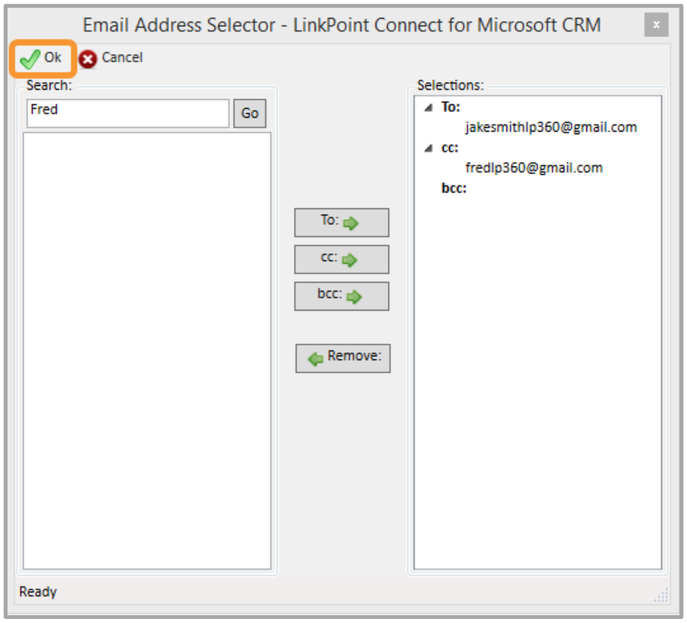
Select a contact in the **Selections** pane and click the **Remove** button to remove them from the recipient list.



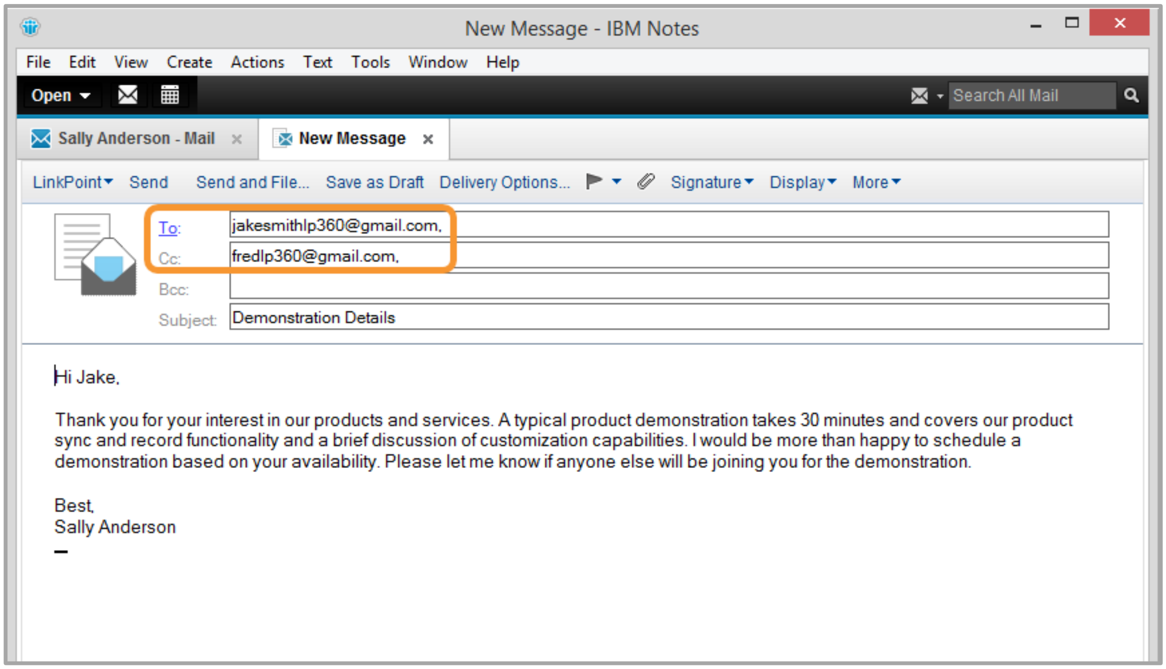
Tip: Double click a contact in either the Search or Selection pane to quickly move it from one side to the other. Double clicking a search item will add it as a To: contact in the Selection pane.

5 Add any additional contacts based on your search criteria. Note that all Microsoft Dynamics CRM contacts and leads that match your search hint *and* have an email address will be displayed.

6 Click the Ok button to confirm the Selections.



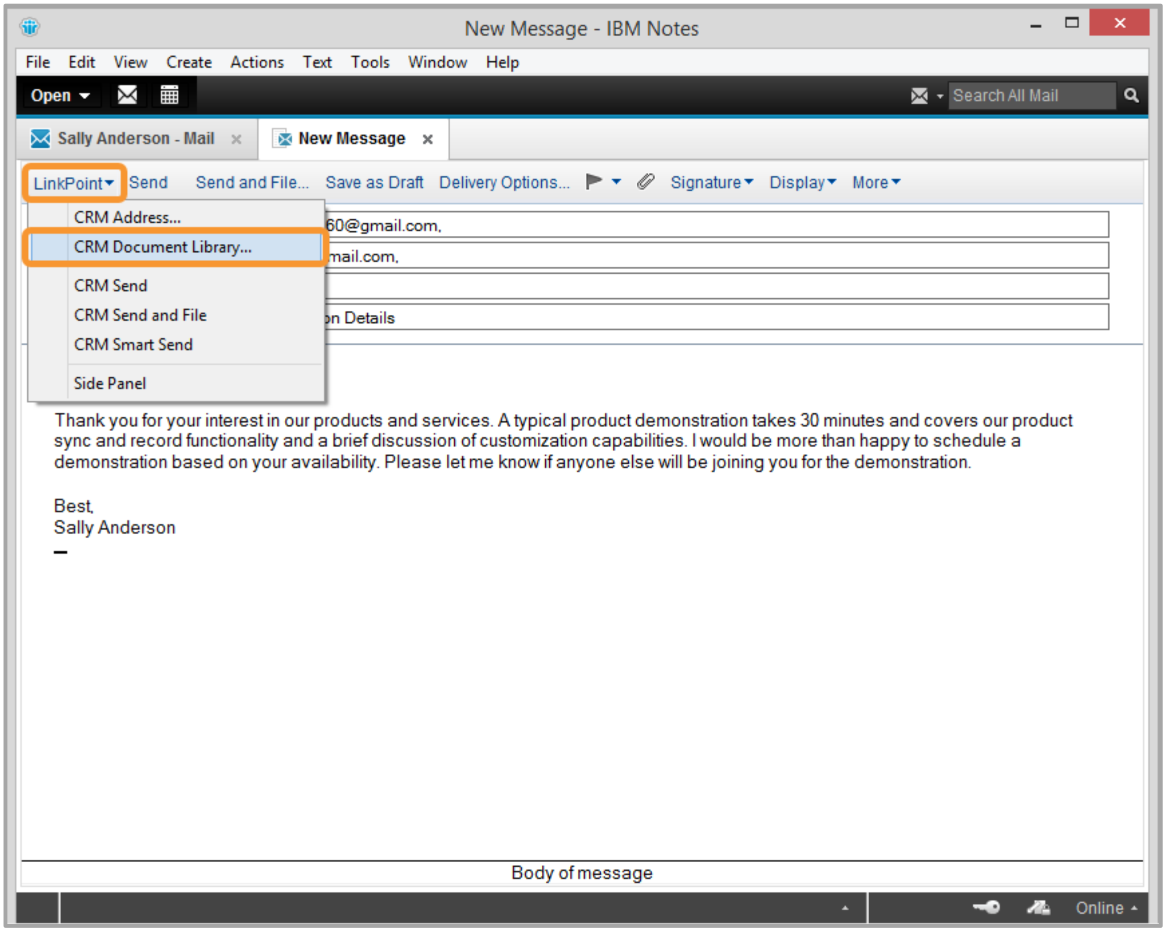
7 Note that the selections have been added to the corresponding fields within the outbound email. Finalize and send the email as you normally would.



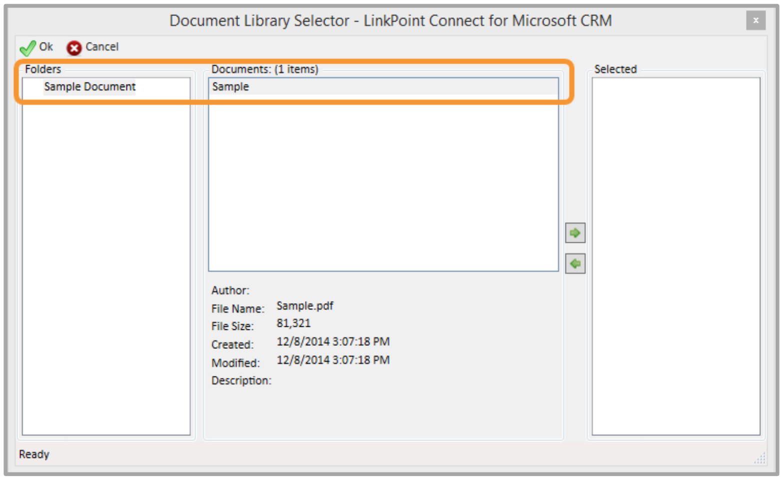
Attaching Microsoft Dynamics CRM Documents to Outbound Emails in IBM Notes

LinkPoint Connect helps users be more efficient by providing access to the resources they use right where they need them. Users are able to access documents that are stored and maintained within Microsoft Dynamics CRM directly from IBM Notes. This eliminates the need to toggle between systems to find the right document to attach. In this section, you will learn how to access your Microsoft Dynamics CRM Sales Literature and attach items to outbound emails from within IBM Notes.

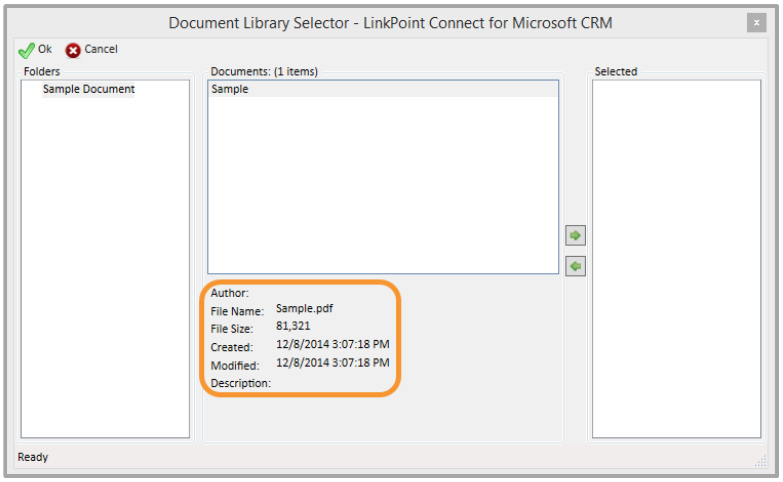
1 Open an outgoing email (either a new or existing email). Select **LinkPoint** from the toolbar, and then select **CRM Document Library…** from the drop-down menu.



2 Select the Microsoft Dynamics CRM **Folder** that contains the document and view a list of available items in the **Documents** list.

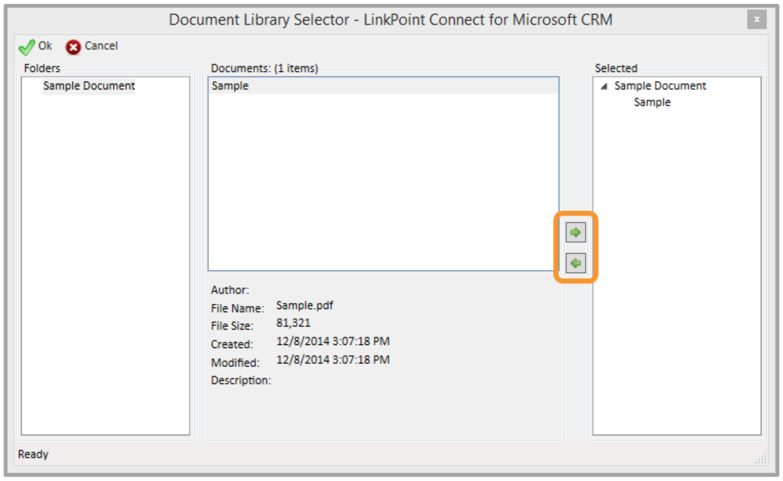


Tip: Note that the document information is displayed below the **Documents** pane.



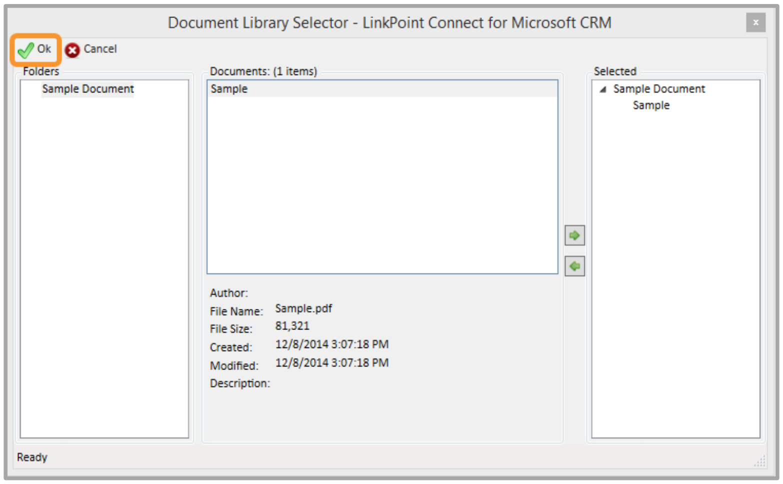
3

Select an item in the **Documents** or **Selected** pane and click the arrows to add or remove the items.



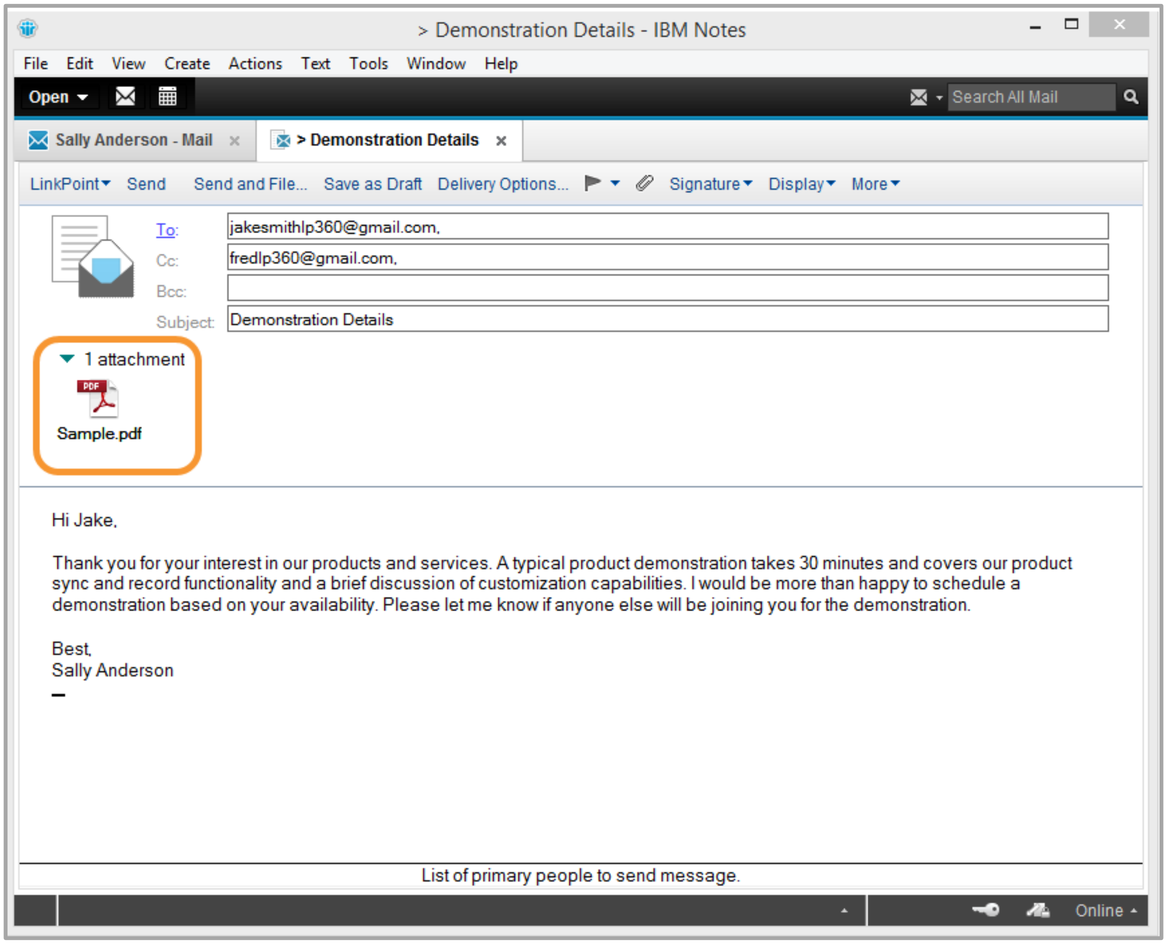
4

Click **OK** to proceed.



5

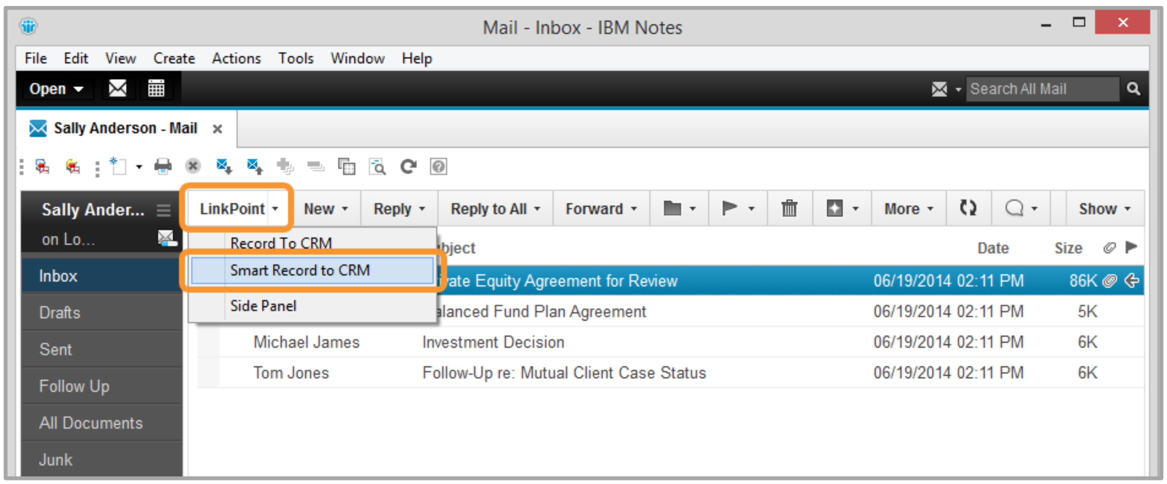
Note that the document from the Microsoft Dynamics CRM Sales Literature is now attached to the email. Finalize and send the email as you normally would.



Recording Emails to Microsoft Dynamics CRM with Smart Record and Smart Send

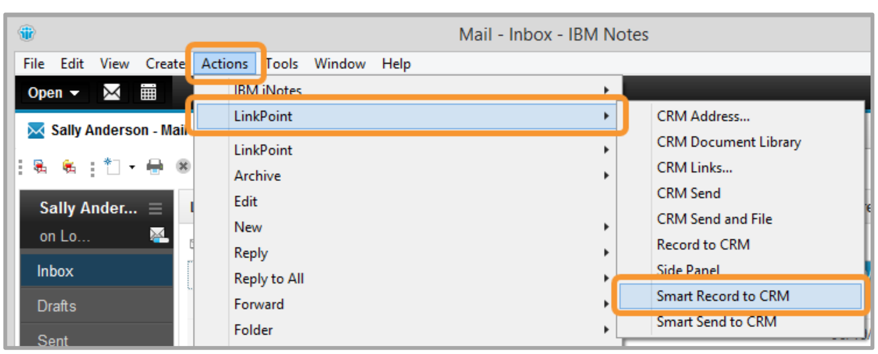
The Smart Record to CRM and Smart Send to CRM buttons offer a quicker way of recording emails to related contacts in Microsoft Dynamics CRM. LinkPoint Connect checks behind the scenes to identify contacts that match between the email recipient fields (To:, Cc:, and Bcc:) and Microsoft Dynamics CRM contacts. The emails are automatically recorded to those contacts that have a match, without the need for the user to work in the LinkPoint Connect Record window. Note that Smart Send and Smart Record do not automatically record to other record types (i.e. Leads) or to other objects (i.e. Opportunity, Case). Users looking for more control over recording should use the Send and Record to CRM button as usual. In this section, you will learn how to use Smart Send and Smart Record.

1 Select an email (or emails) within the IBM Notes inbox. Select **LinkPoint** from the IBM Notes toolbar and select **Smart Record to CRM** from the drop-down list.

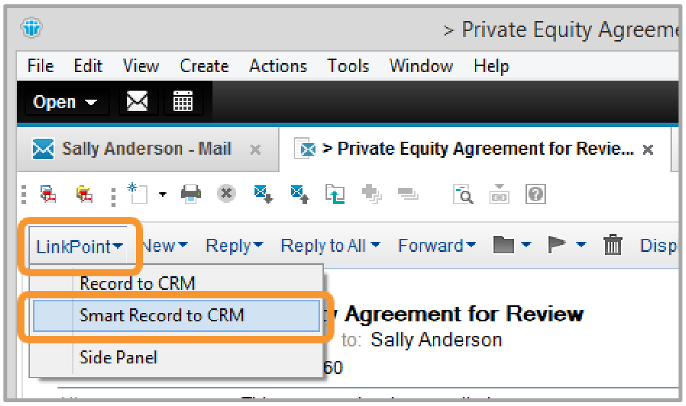


Tip: There are three other ways to access the Smart Record functionality for LinkPoint Connect. These options may vary depending on how your organization has installed LinkPoint Connect.

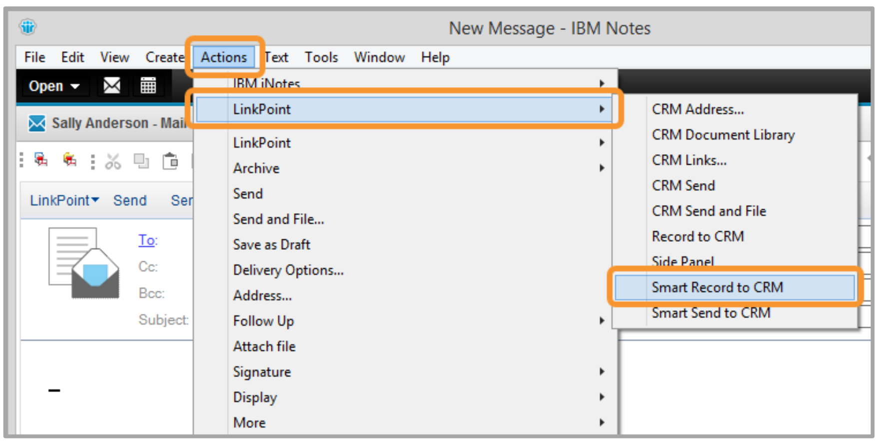
- Select **Actions** from the main menu, select **LinkPoint** from the drop-down menu, and then select **Smart Record to CRM** from the list.



- Within an open email, select **LinkPoint** on the toolbar and select **Smart Record to CRM**.



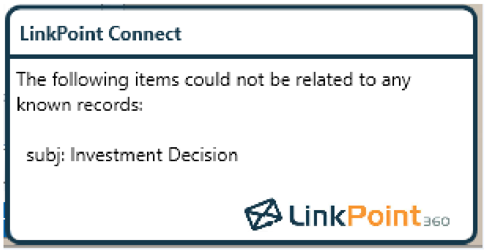
- Create an outbound email. Select **Actions** from the main menu, select **LinkPoint** from the drop-down menu, and then select **Smart Record to CRM** from the list.



2 LinkPoint Connect will run a background search to determine whether any of the email recipients or senders match Contact records in Microsoft Dynamics CRM. The email will be recorded to all matching Microsoft Dynamics CRM contact records automatically. A pop-up notification will confirm that the email has been recorded.

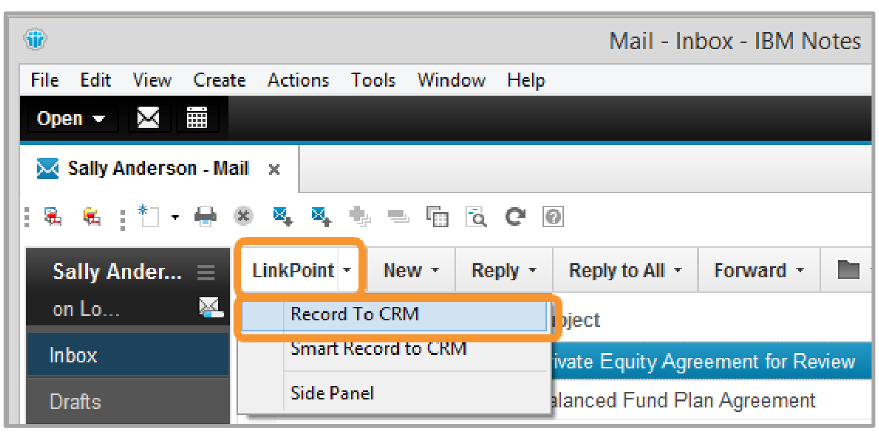
3

LinkPoint Connect will identify any emails that include contacts for which there is no match in Microsoft Dynamics CRM. A pop-up notification will indicate the email that was not recorded, and the Record window will launch to allow the user to record the email with options.



Warning: If there are multiple emails without a matching Contact record in Microsoft Dynamics CRM, a pop-up notification will indicate the emails that were not recorded by subject line. However, the Record window will not automatically launch.

Tip: If you want to record the email to a combination of Contacts and objects such Opportunity or Case, use the **Record to CRM** button instead.



Syncing with LinkPoint Connect

Understanding LinkPoint Connect Sync Functionality

LinkPoint Connect is designed to simplify the process of synchronizing your calendar, contact, and task data between IBM Notes and Microsoft Dynamics CRM. Users can seamlessly connect existing accounts without the need to manually input sales leads and client information into two separate destinations.

LinkPoint Connect synchronizes calendars, contacts, and tasks between IBM Notes and Microsoft Dynamics CRM using two sync types: Manual and Auto. Organizations or users can decide how they would like to manage their sync settings based on how they use IBM Notes and Microsoft Dynamics CRM throughout the day.

Users can configure LinkPoint Connect to synchronize accounts automatically using custom settings or manually synchronize each account for more control. Users can also use the tool to coordinate lead and client record keeping in Microsoft Dynamics CRM with IBM Notes-based lead and client communication.

Functionality highlights include:

- Customize the flow of information between IBM Notes and Microsoft Dynamics CRM
- Configure the synchronization to your specific preferences
- Set the synchronization run times and focus on other tasks while it runs
- Compare your existing calendar, contact, and task data without manual entry
- Rebuild previous synchronizations to reset where information is stored
- Experience convenient technical support to troubleshoot any synchronization issues
- Manage sync settings easily with LinkPoint Assist

Manual Sync

Users must take action each time they would like to synchronize calendars, contacts, or tasks using Manual Sync. As part of the process, users are prompted to confirm the settings and selections for each sync type. Users can run the Manual Sync as often as needed in the background. LinkPoint360 recommends that first time product users run a manual sync before running an auto sync to avoid duplication issues.

Auto Sync

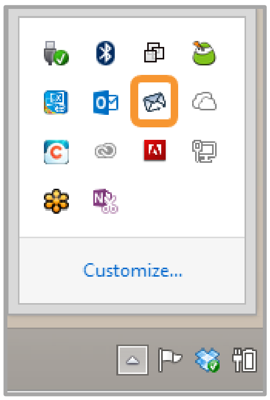
Users can set up their preferred synchronization options within LinkPoint Assist to use the Auto Sync feature. The configuration to automate when and how calendar, contact, and task items move between systems. These settings are highly configurable on a per user basis or can be configured the same way for an entire organization by the LinkPoint360 Professional Services Team.

Configuring LinkPoint Connect Manual Sync Settings

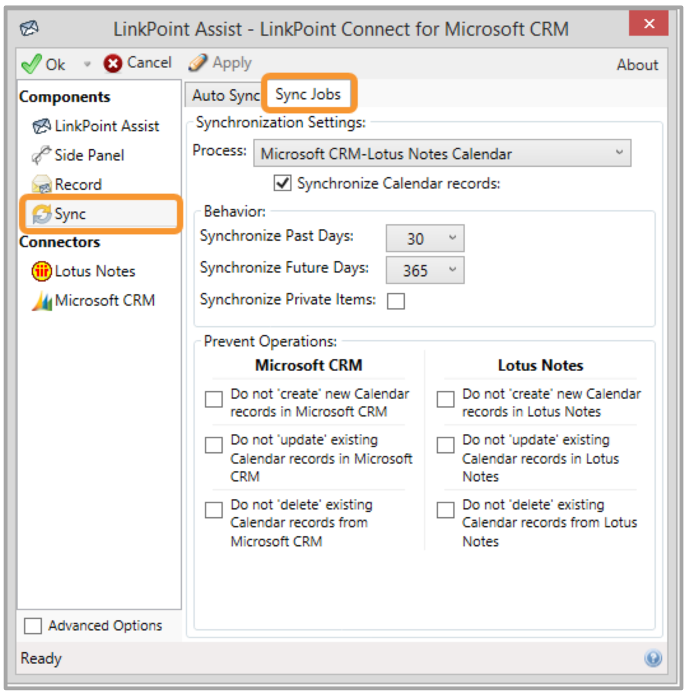
Before running a Manual Sync or scheduling an Auto Sync, it is important for users to become familiar with the available LinkPoint Connect sync settings. The synchronization of calendars, contacts, and tasks works similarly but can be managed separately based on user preference. Configuration settings for LinkPoint Connect are managed within the LinkPoint Assist window. In this section, you will learn how to access and alter the sync settings available for LinkPoint Connect Manual Sync.

Example: In this example, we will demonstrate how to configure the sync settings for Calendar items. The available sync setting options are similar for Calendars, Contacts, and Tasks.

1 Double click the **LinkPoint Assist** icon in the system tray with the right mouse button to open LinkPoint Assist.

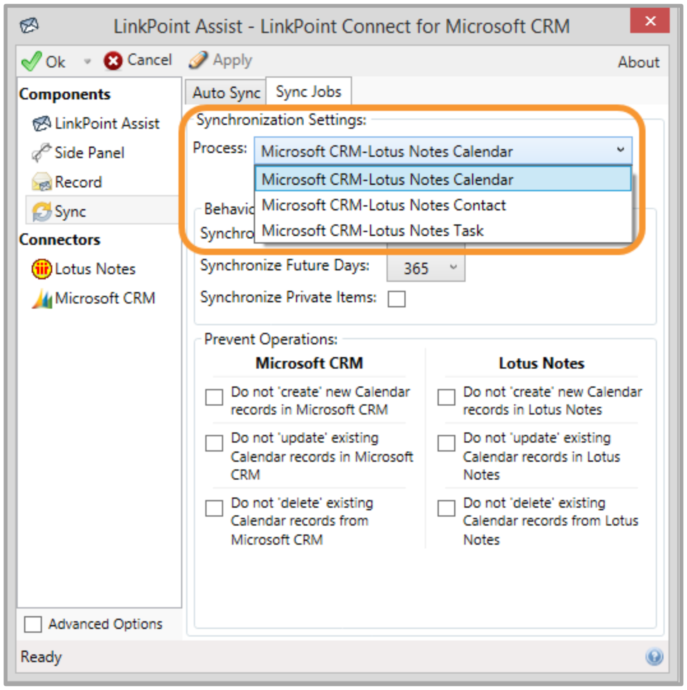


2 Select **Sync** from the **Components** list within the **LinkPoint Assist** window, and select the **Sync Jobs** tab.



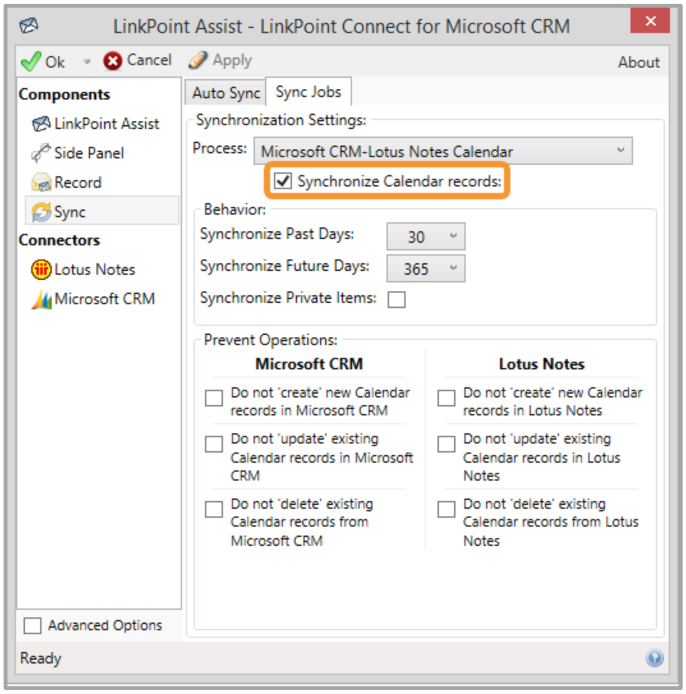
3

Select the **Process** to configure from the drop-down list. The options include Calendar, Contact, and Task.

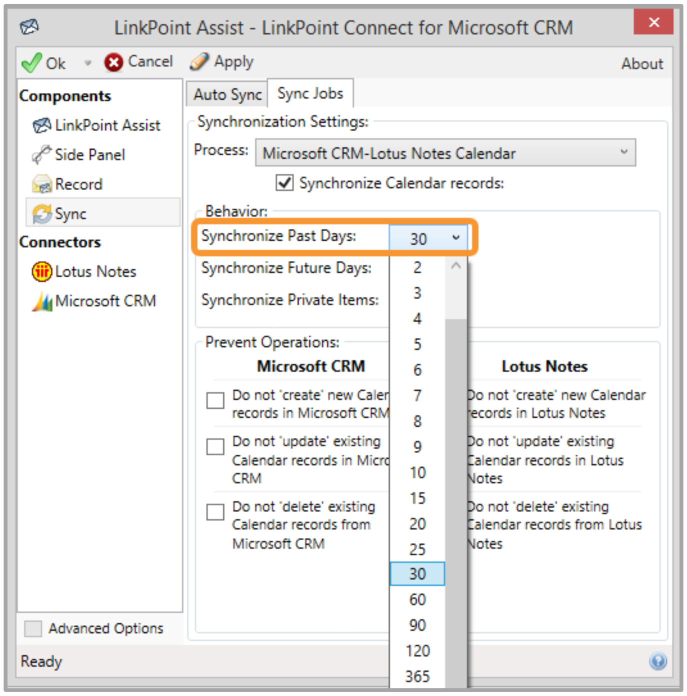


Tip: Sync settings for Calendars, Contacts, and Tasks are managed separately to give you more control over how your data is moved between IBM Notes and Microsoft Dynamics CRM. You will need to choose your sync settings individually for each Process by returning to the drop-down list and selecting the next item.

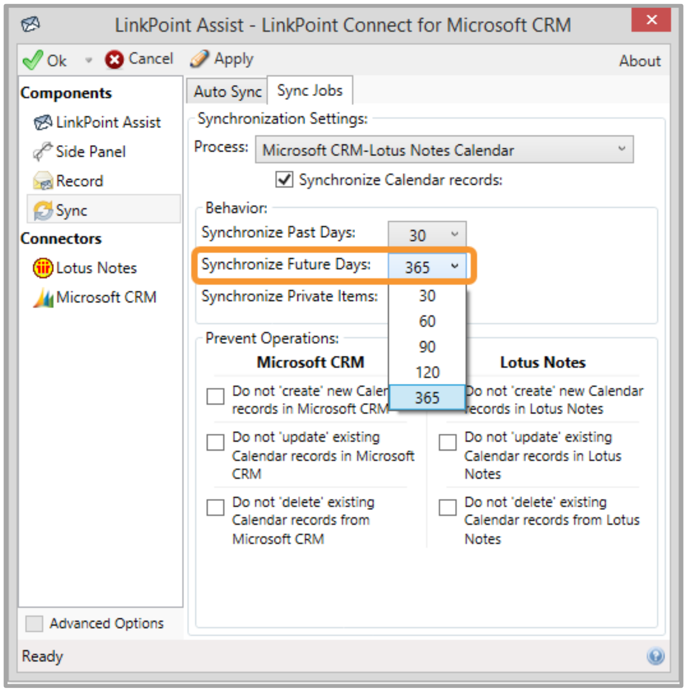
4 Select the **Synchronize Calendar records** checkbox to ensure that Calendar sync is enabled.



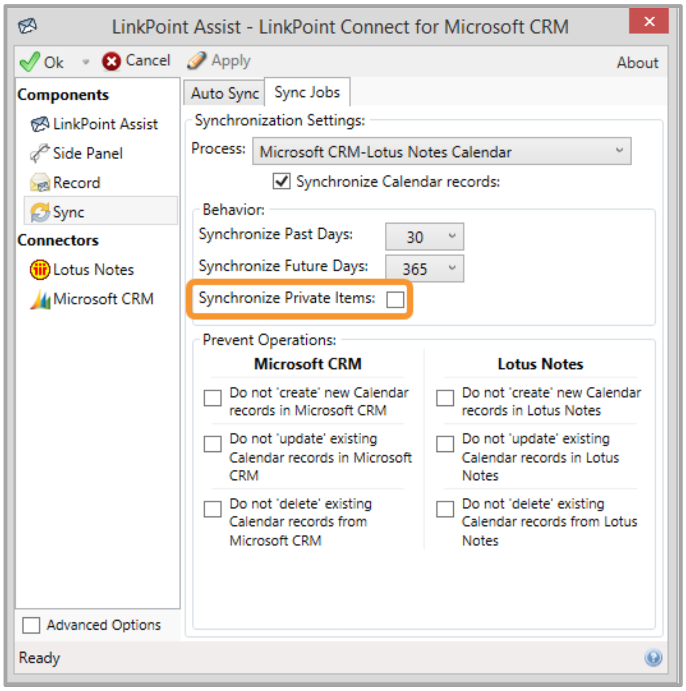
5 Select the number of days from the **Synchronize Past Days** drop-down list. This will determine how far back the sync will update or include information for dated items that occurred in the past.



6 Select the number of days from the **Synchronize Future Days** drop-down list.

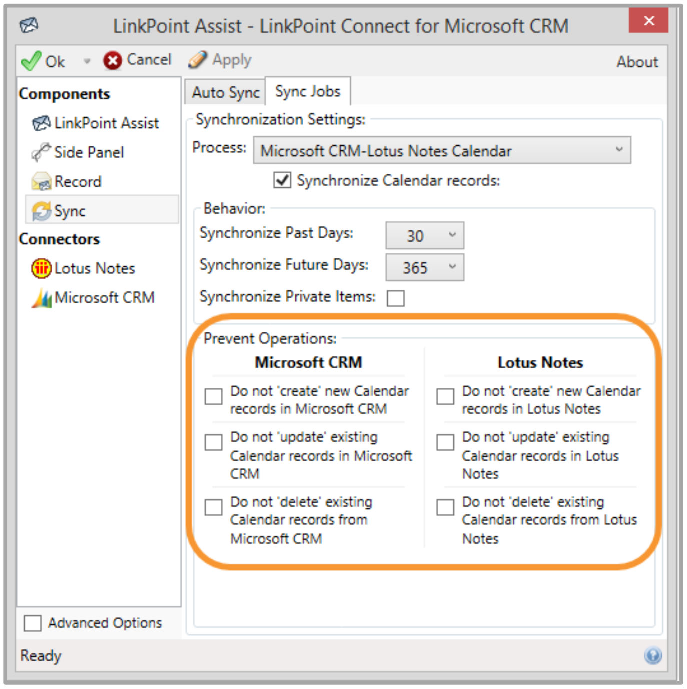


7 Deselect the **Synchronize Private Items** checkbox to ensure that Calendar items marked as Private are not included in the sync. Select the checkbox to send Private items between IBM Notes and Microsoft Dynamics CRM. Note that this option is deselected by default by LinkPoint Connect.



Tip: Remember, you will need to manually set any private Calendar items as Private on your calendar. LinkPoint Connect only checks existing privacy settings and does not create privacy for individual items.

8 Select the options in the **Prevent Operations** section of the Sync Jobs tab based on workflow need.

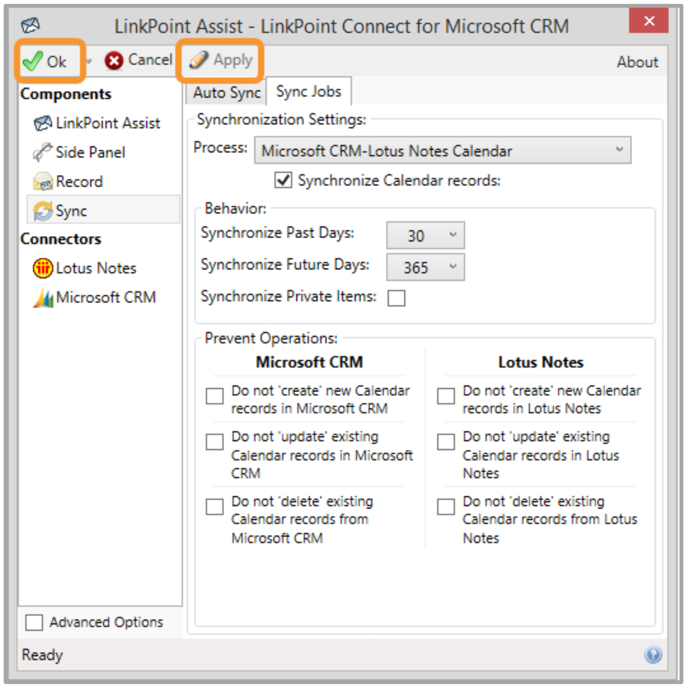


Tip: Users can prevent LinkPoint Connect from creating, updating, or deleting items regardless of any other system settings. Users can set this individually for IBM Notes and Microsoft Dynamics CRM, effectively creating bidirectional or one-way sync rules.

Tip: The **Do not 'delete' existing Calendar records from Microsoft CRM** option is selected by default in LinkPoint Connect as a precaution for users who do not want items removed from their Microsoft Dynamics CRM calendar. You can deselect the checkbox to override this setting.

9

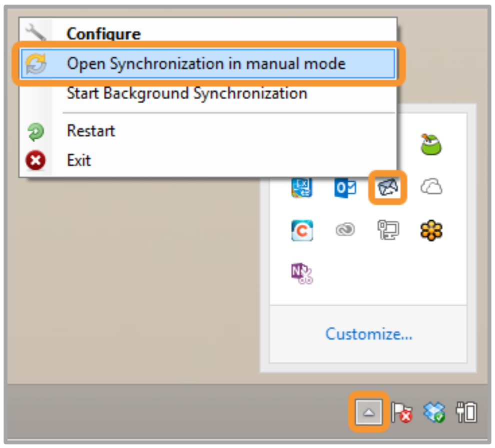
Click the **Apply** button when finished to finalize the settings. Click **Ok** to close LinkPoint Assist.



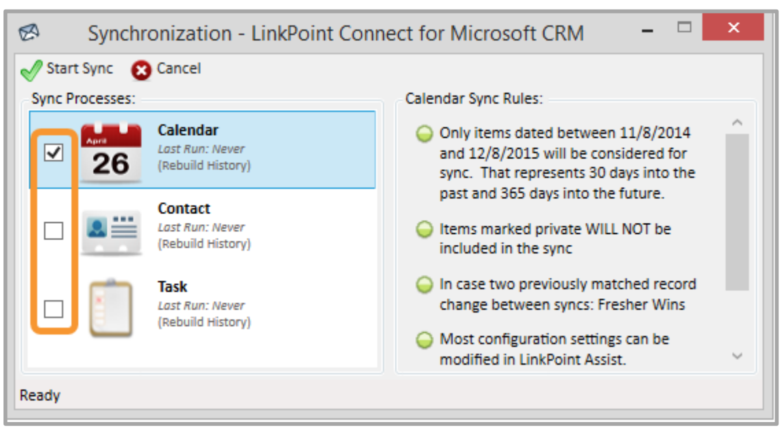
Syncing Calendar Items Between IBM Notes and Microsoft Dynamics CRM with Manual Sync

LinkPoint Connect offers users the flexibility to control when and how their calendar items are synchronized between IBM Notes and Microsoft Dynamics CRM with a Manual Sync feature. In this section, you will learn how to use Manual Sync to synchronize calendar items both to and from IBM Notes and Microsoft Dynamics CRM.

1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Open Synchronization in manual mode**.

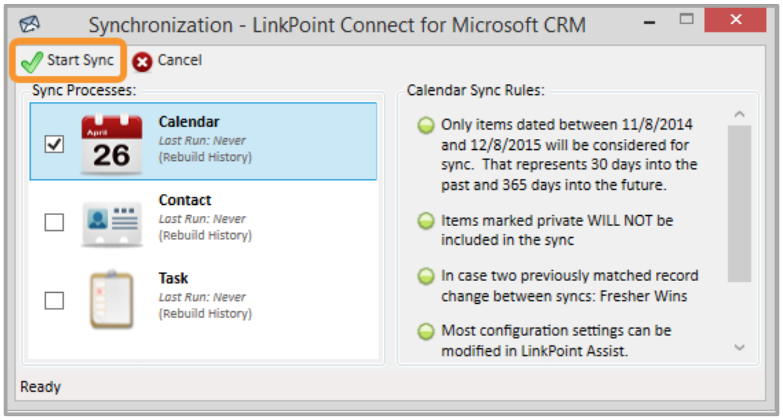


2 Select the **Calendar** checkbox. Deselect any other items you do not want to sync at this time.



Example: In this example, we will demonstrate how to sync **Calendar** items.

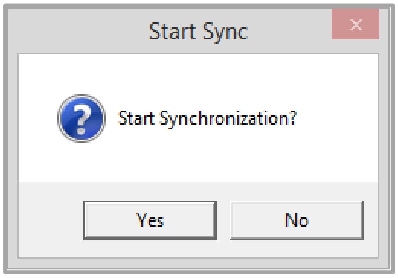
3 Click the **Start Sync** button to proceed.



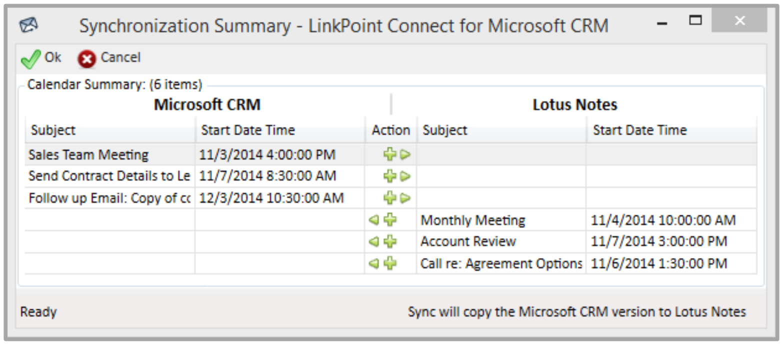
Tip: You will have a chance to review and confirm the items to be synchronized before the tool actually runs the synchronization process.

Additional Resources: Several default **Calendar Sync Rules** are applied as part of the sync process. These settings can be configured using LinkPoint Assist. This includes choosing whether or not to sync items marked as Private.

4 Click **Yes** in the Start Sync dialogue box.

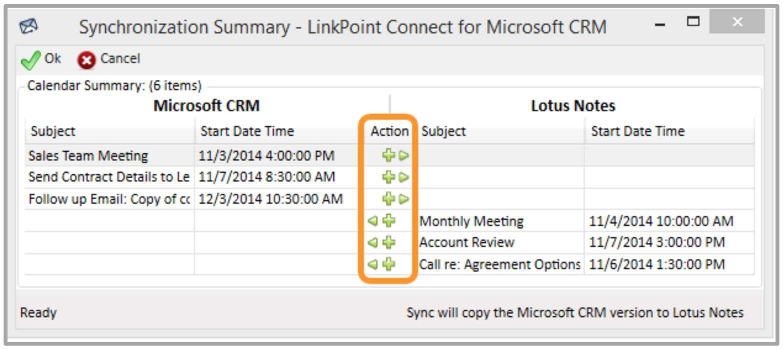


5 Review the **Synchronization Summary** window to see a list of all new or updated calendar items that match the established sync criteria. Items that exist in Microsoft Dynamics CRM appear on the left. Items that exist in IBM Notes appear on the right.



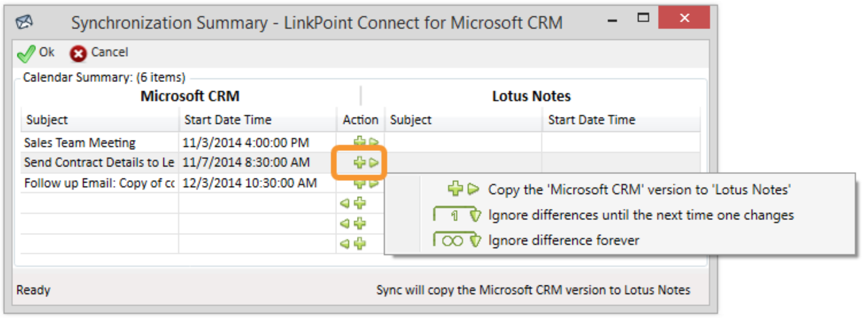
Tip: Attachments included with Calendar items do not sync to Microsoft Dynamics CRM as part of the sync process. You will be able to see the file names of the attachments that were included, but these attachments remain in Microsoft Outlook.

6 Review the icons in the **Action** column to determine how LinkPoint Connect will be syncing the displayed items. These actions relate to new, updated, or deleted items either in Microsoft Dynamics CRM or IBM Notes.



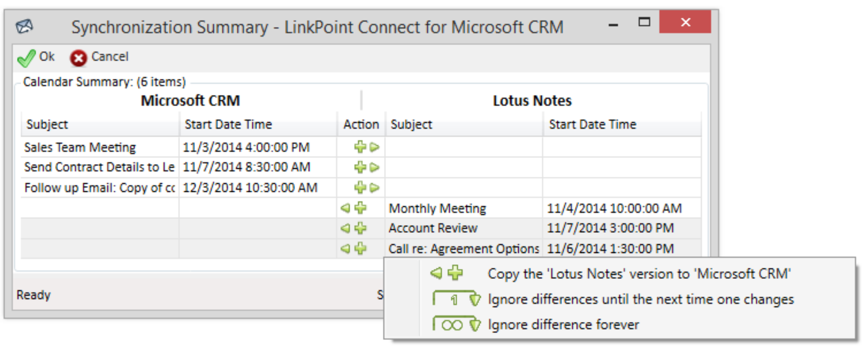
Icon	Action
	New Microsoft Dynamics CRM item will be added to IBM Notes
	New IBM Notes item will be added to Microsoft Dynamics CRM
	Updated Microsoft Dynamics CRM item will be updated in IBM Notes
	Updated IBM Notes item will be updated in Microsoft Dynamics CRM
	Deleted Microsoft Dynamics CRM item will be removed from IBM Notes
	Deleted IBM Notes item will be removed from Microsoft Dynamics CRM

7 Right click an **Action** icon to launch a list of additional options for the item. Users can choose to **Ignore differences until the next time one changes** or **Ignore difference forever**.

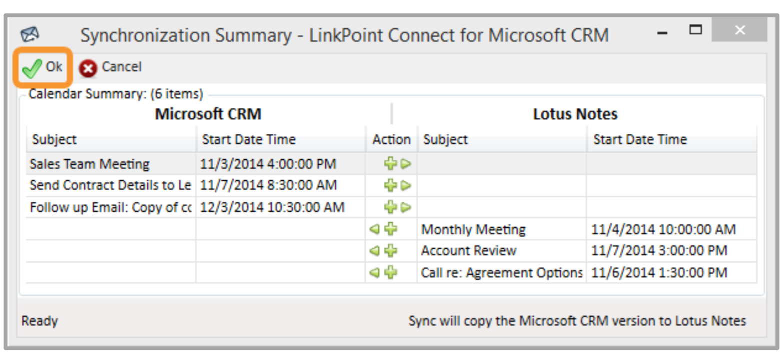


Tip: This is useful for excluding specific items from the sync for a single time or to exclude an item from the sync moving forward. Some users may have appointments that, while not marked as Private, do not need to be or should not be added to Microsoft Dynamics CRM or IBM Notes.

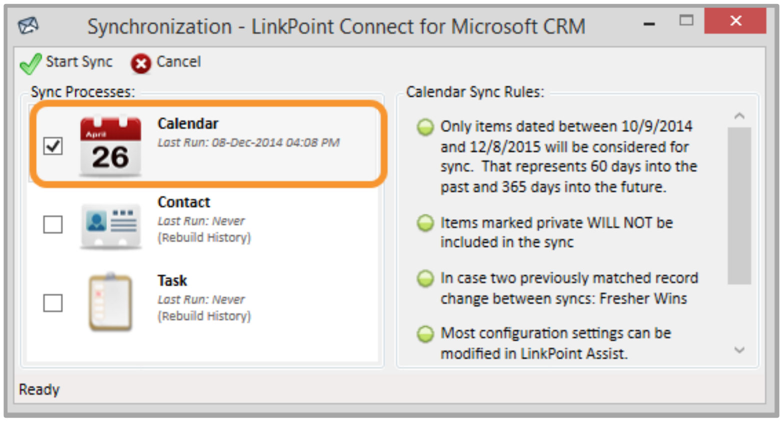
Tip: You can select multiple calendar items to apply changes by clicking the items with your mouse while holding the Shift key on your keyboard. Once the items are selected, right click to review the Action options.



8 Click the **Ok** button to confirm the items to sync and to run the actual sync process.



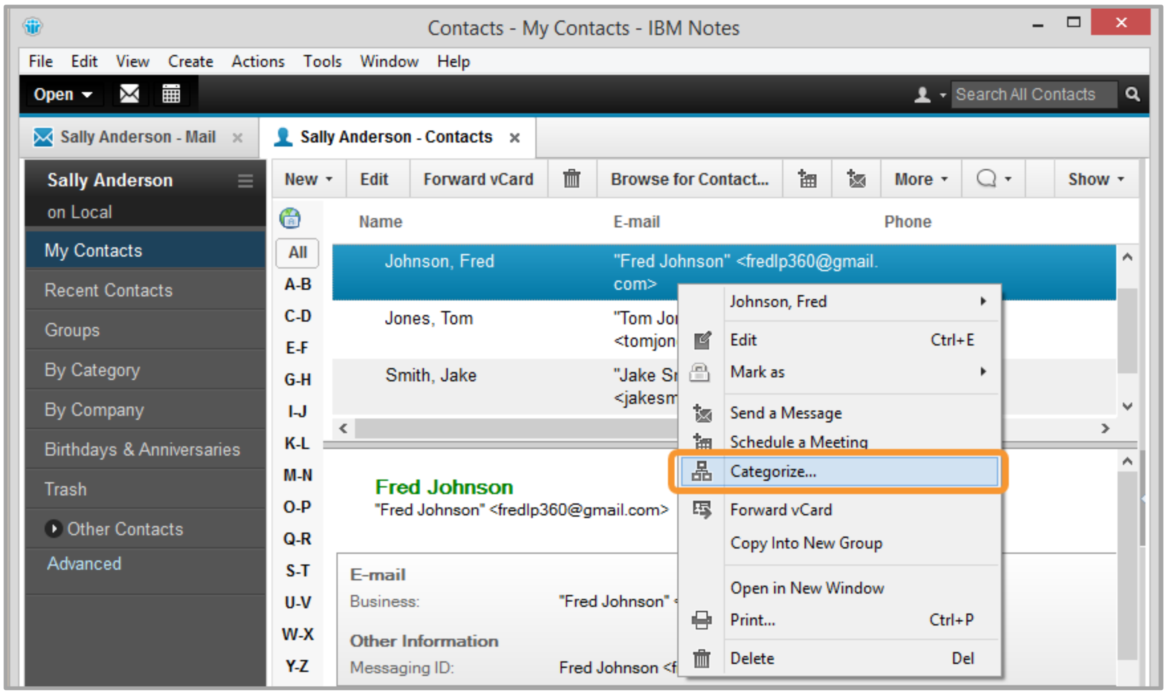
Tip: LinkPoint Connect will confirm the sync completion by updating the **Last Run** date and time in the Synchronization window.



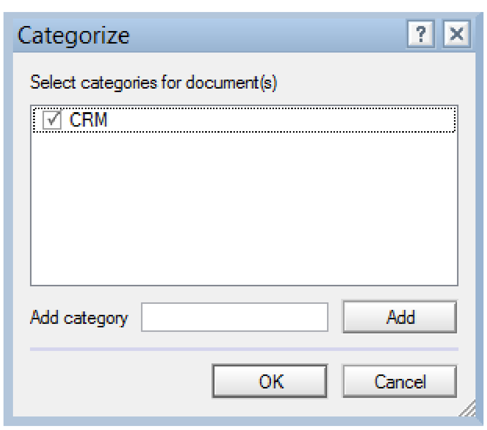
Syncing Contacts Between IBM Notes and Microsoft Dynamics CRM with Manual Sync

LinkPoint Connect offers users the flexibility to control when and how their contacts are synchronized between IBM Notes and Microsoft Dynamics CRM with a Manual Sync feature. In this section, you will learn how to use Manual Sync to synchronize contacts both to and from IBM Notes and Microsoft Dynamics CRM.

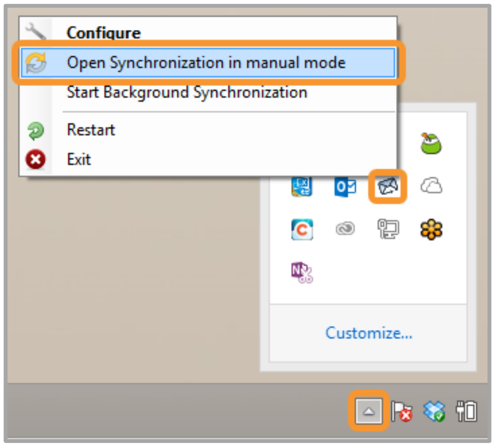
Tip: Before starting a Contact Sync, be sure that the IBM Notes contacts that you want to sync are assigned a Category of CRM. Select a contact, right click and select **Categorize**.



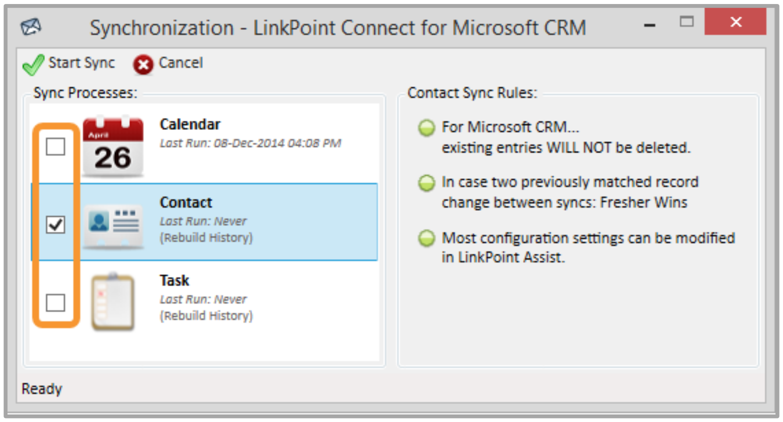
Select **CRM** category and then click **OK**. You may need to create the category first if you do not see it in the list of available options.



1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Open Synchronization in manual mode**.

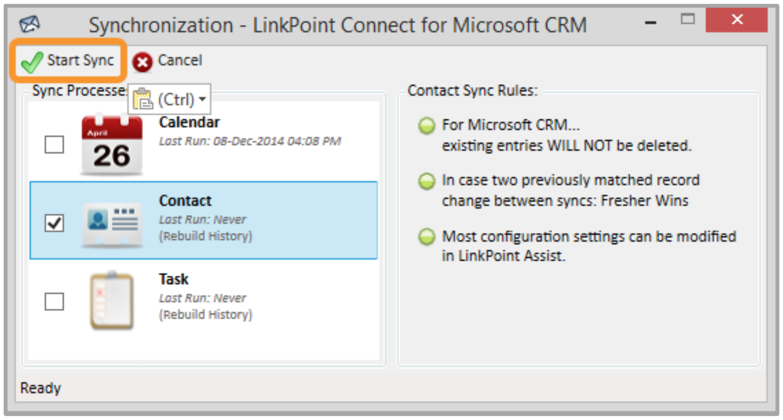


2 Select the **Contact** checkbox. Deselect any other items you do not want to sync at this time.



Example: In this example, we will demonstrate how to sync **Contact** items.

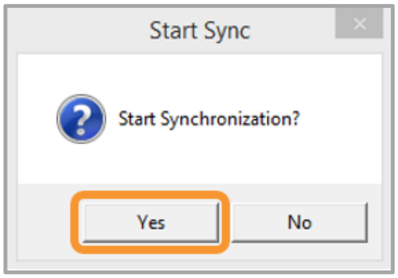
3 Click the **Start Sync** button to proceed.



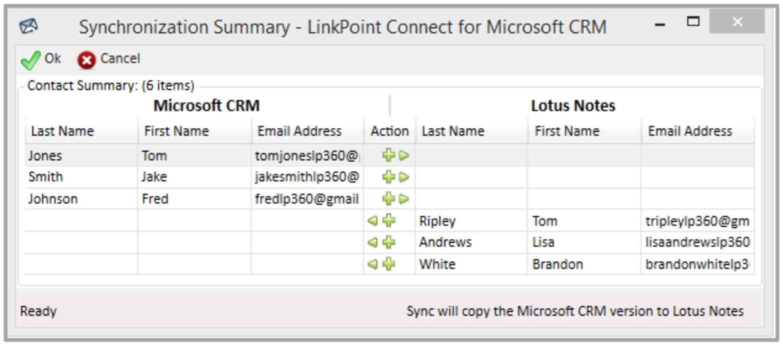
Tip: You will have a chance to review and confirm the items to be synchronized before the tool actually runs the synchronization process.

Additional Resources: Several default **Contact Sync Rules** are applied as part of the sync process. These settings can be configured using LinkPoint Assist. This includes choosing whether or not to sync items marked as Private.

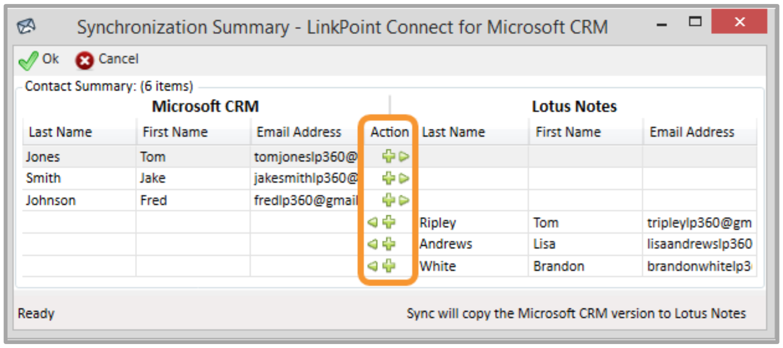
4 Click **Yes** in the Start Sync dialogue box.



5 Review the **Synchronization Summary** window to see a list of all new or updated contacts that match the established sync criteria. Contacts that exist or were updated in Microsoft Dynamics CRM appear on the left. Contacts that exist or were updated in IBM Notes appear on the right.

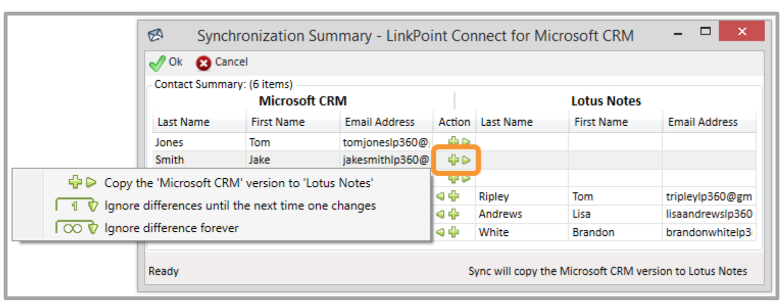


6 Review the icons in the **Action** column to determine how LinkPoint Connect will be syncing the displayed contacts. These actions relate to new, updated, or deleted contacts either in Microsoft Dynamics CRM or IBM Notes.



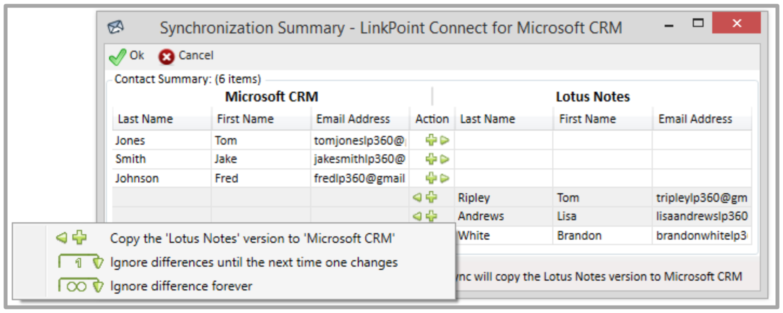
Icon	Action
	New Microsoft Dynamics CRM contact will be added to IBM Notes
	New IBM Notes contact will be added to Microsoft Dynamics CRM
	Updated Microsoft Dynamics CRM contact will be updated in IBM Notes
	Updated IBM Notes contact will be updated in Microsoft Dynamics CRM
	Deleted Microsoft Dynamics CRM contact will be removed from IBM Notes
	Deleted IBM Notes contact will be removed from Microsoft Dynamics CRM

7 Right click an **Action** icon to launch a list of additional options for the contact. Users can choose to **Ignore differences until the next time one changes** or **Ignore difference forever**.



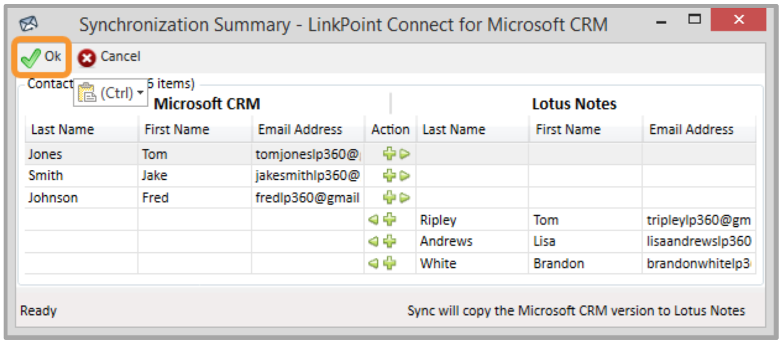
Tip: This is useful for excluding specific contacts from the sync for a single time or to exclude a contact from the sync moving forward.

Tip: You can select multiple contacts to apply changes by clicking the contacts with your mouse while holding the Shift key on your keyboard. Once the contacts are selected, right click to review the Action options.

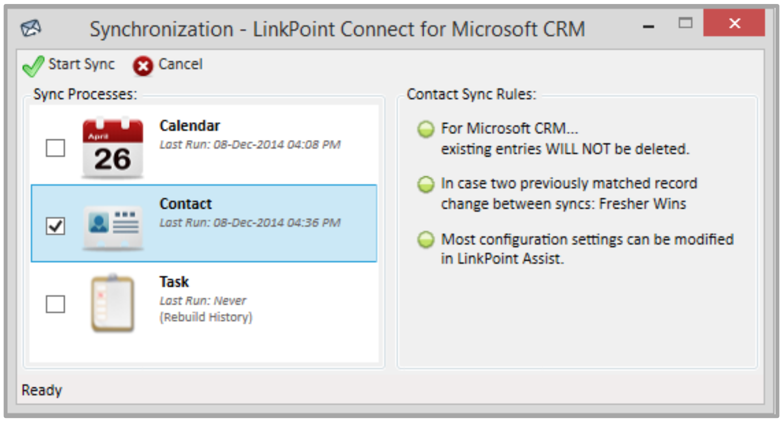


8

Click the **Ok** button to confirm the contacts to sync and to run the actual sync process.



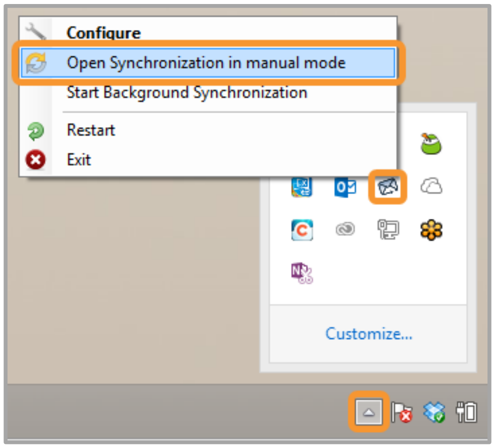
Tip: LinkPoint Connect will confirm the sync completion by updating the **Last Run** date and time in the Synchronization window.



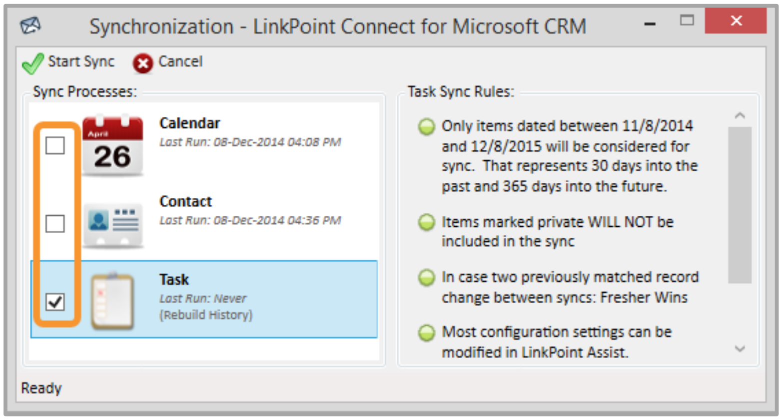
Syncing Tasks between IBM Notes and Microsoft Dynamics CRM with Manual Sync

LinkPoint Connect offers users the flexibility to control when and how their tasks are synchronized between IBM Notes and Microsoft Dynamics CRM with a Manual Sync feature. In this section, you will learn how to use Manual Sync to synchronize tasks both to and from IBM Notes and Microsoft Dynamics CRM.

1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Open Synchronization in manual mode**.

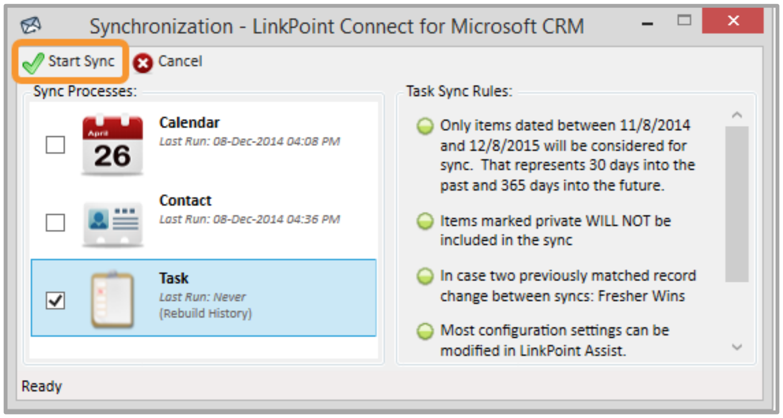


2 Select the **Task** checkbox. Deselect any other items you do not want to sync at this time.



Example: In this example, we will demonstrate how to sync **Task** items.

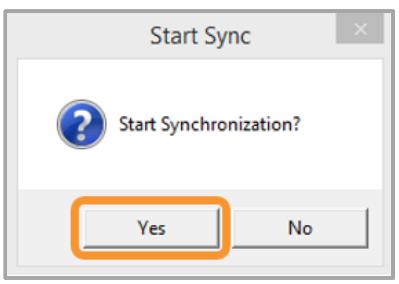
3 Click the **Start Sync** button to proceed.



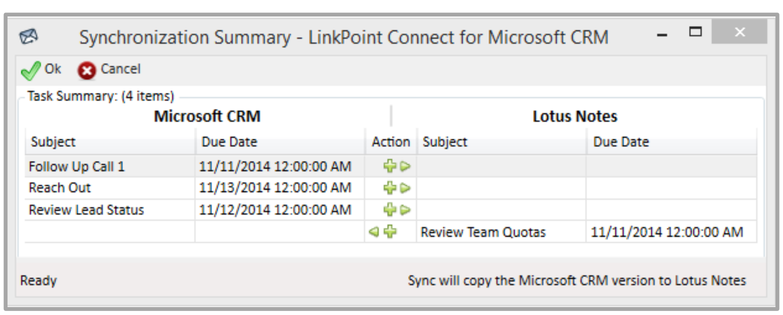
Tip: You will have a chance to review and confirm the items to be synchronized before the tool actually runs the synchronization process.

Additional Resources: Several default **Task Sync Rules** are applied as part of the sync process. These settings can be configured using LinkPoint Assist. This includes choosing whether or not to sync items marked as Private.

4 Click **Yes** in the Start Sync dialogue box.



5 Review the **Synchronization Summary** window to see a list of all new or updated tasks that match the established sync criteria. Tasks that exist in Microsoft Dynamics CRM appear on the left. Tasks that exist in IBM Notes appear on the right.



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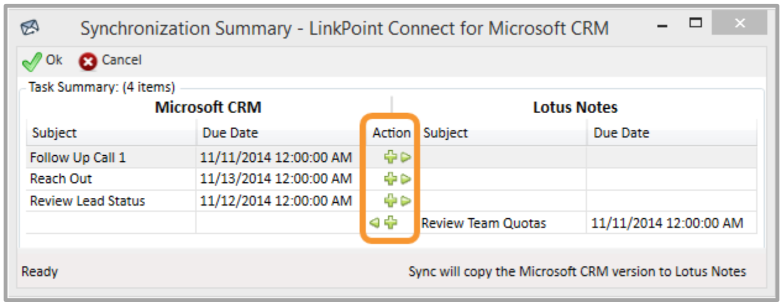
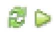
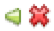
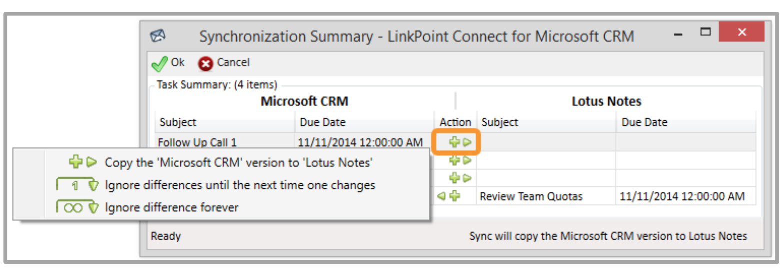
Review the icons in the **Action** column to determine how LinkPoint Connect will sync the displayed tasks. These actions relate to new, updated, or deleted tasks either in Microsoft Dynamics CRM or IBM Notes.



Icon	Action
	New Microsoft Dynamics CRM task will be added to IBM Notes
	New IBM Notes task will be added to Microsoft Dynamics CRM
	Updated Microsoft Dynamics CRM task will be updated in IBM Notes
	Updated IBM Notes task will be updated in Microsoft Dynamics CRM
	Deleted Microsoft Dynamics CRM task will be removed from IBM Notes
	Deleted IBM Notes task will be removed from Microsoft Dynamics CRM

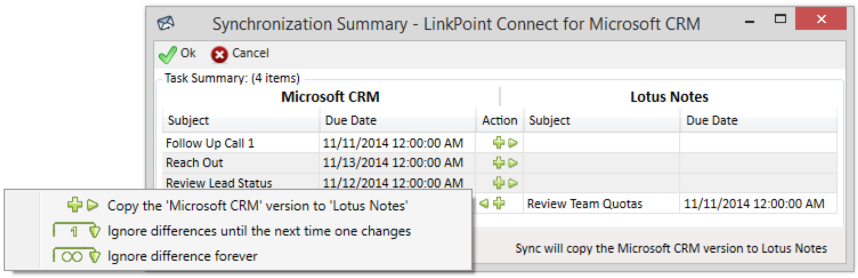
7

Right click an **Action** icon to launch a list of additional options for the task. Users can choose to **Ignore differences until the next time one changes** or **Ignore difference forever**.

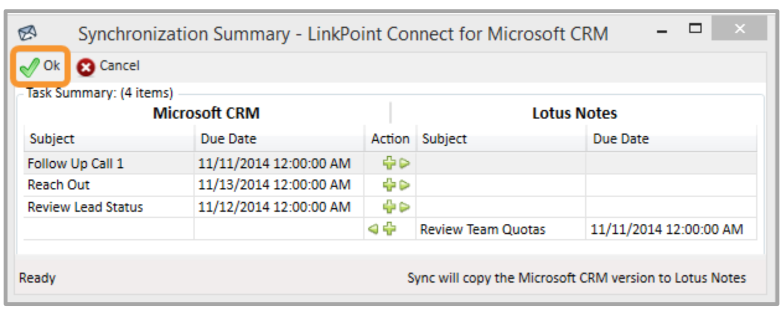


Tip: This is useful for excluding specific items from the sync for a single time or to exclude an item from the sync moving forward. Some users may have tasks that are not related to specific accounts and should not be added to Microsoft Dynamics CRM or IBM Notes.

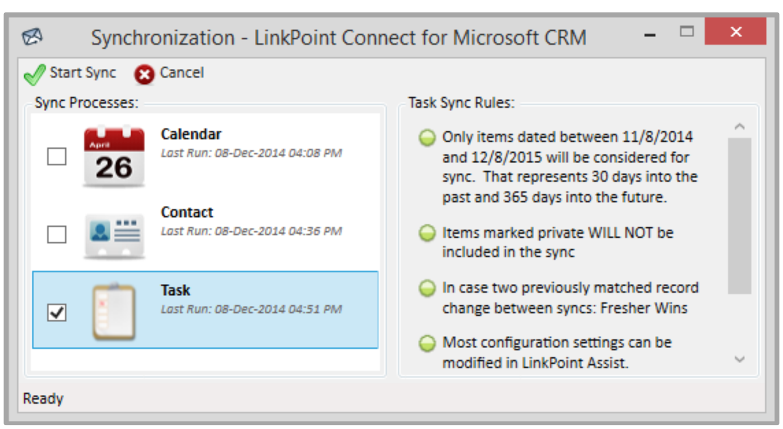
Tip: You can select multiple tasks to apply changes by clicking the items with your mouse while holding the Shift key on your keyboard. Once the items are selected, right click to review the Action options.



8 Click the **Ok** button to confirm the tasks to sync and to run the actual sync process.



Tip: LinkPoint Connect will confirm the sync completion by updating the **Last Run** date and time in the Synchronization window.

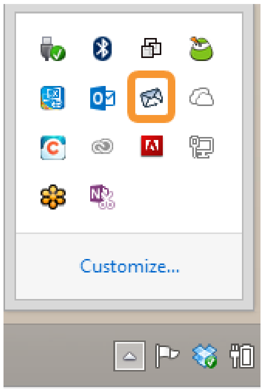


Configuring LinkPoint Connect Auto Sync Settings

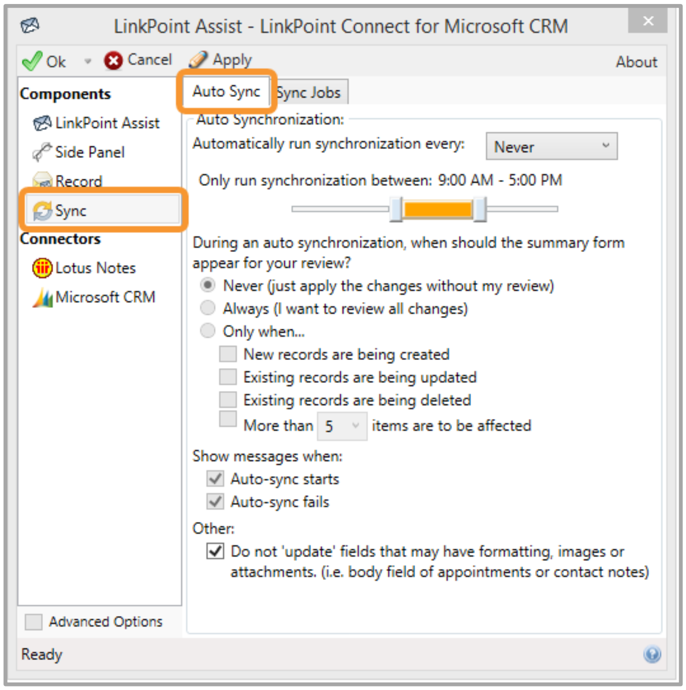
Before running a Manual Sync or scheduling an Auto Sync, it is important for users to become familiar with the available LinkPoint Connect sync settings. The synchronization of calendars, contacts and tasks works similarly but can be managed separately based on user preference. Users can set the timing and run schedule for the Auto Sync. In this section, you will learn how to configure the sync settings for LinkPoint Connect Auto Sync.

Warning: LinkPoint360 recommends that all first time users of LinkPoint Connect set up and run a manual synchronization for the first IBM Notes and Microsoft Dynamics CRM sync. This offers users the opportunity to review the sync results *before* they take effect.

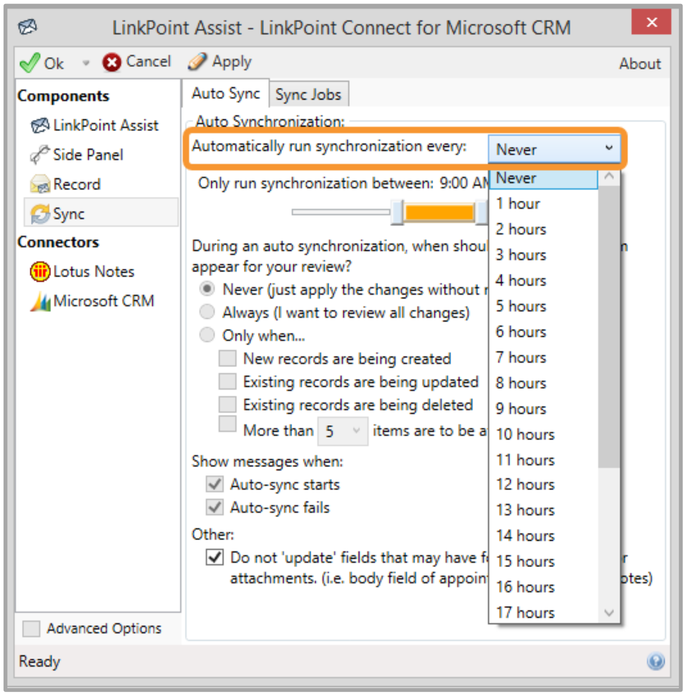
1 Double click the **LinkPoint Assist** icon in the system tray with the right mouse button to open LinkPoint Assist.



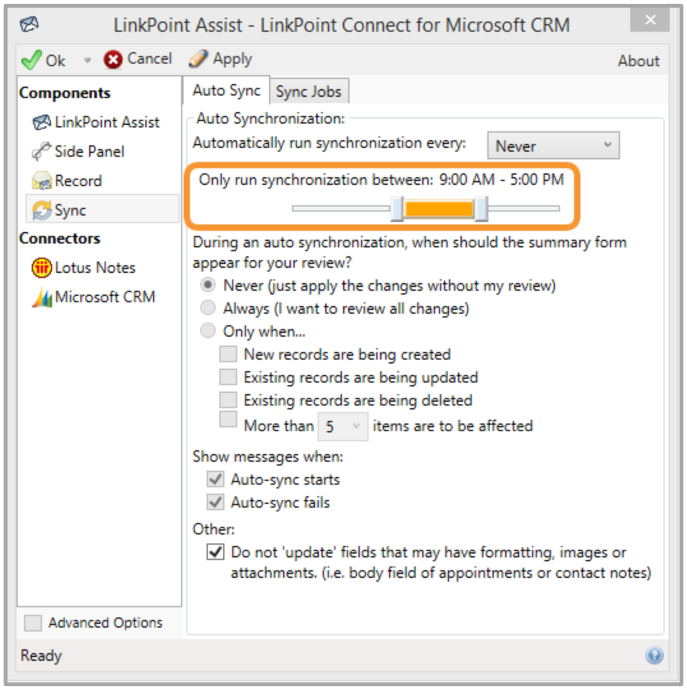
2 Select **Sync** from the **Components** list on the left side of the **LinkPoint Assist** window, and select the **Auto Sync** tab.



3 Select how frequently to run the Auto Sync from the options in the **Automatically run synchronization every:** drop-down list, which includes hourly increments throughout the day.

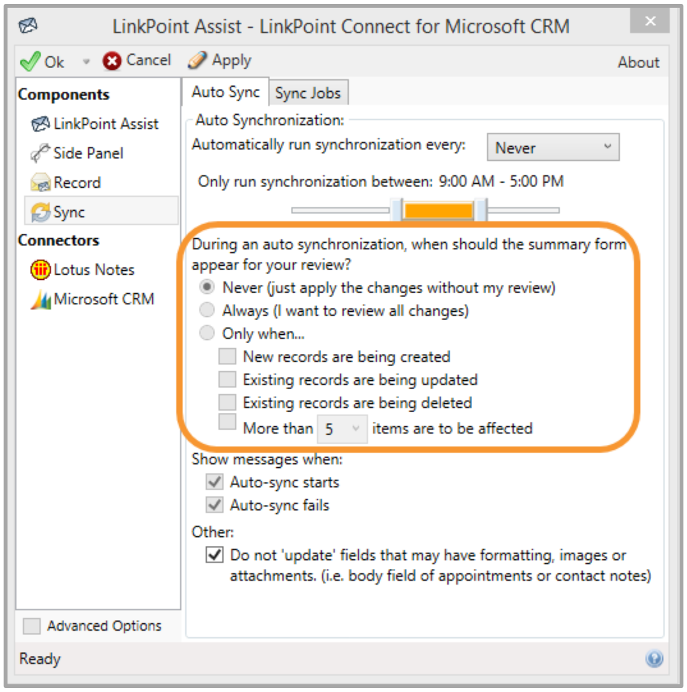


4 Select the time frame during which the Auto Sync should run during the day. Slide the selectors to the left or right to adjust the range.



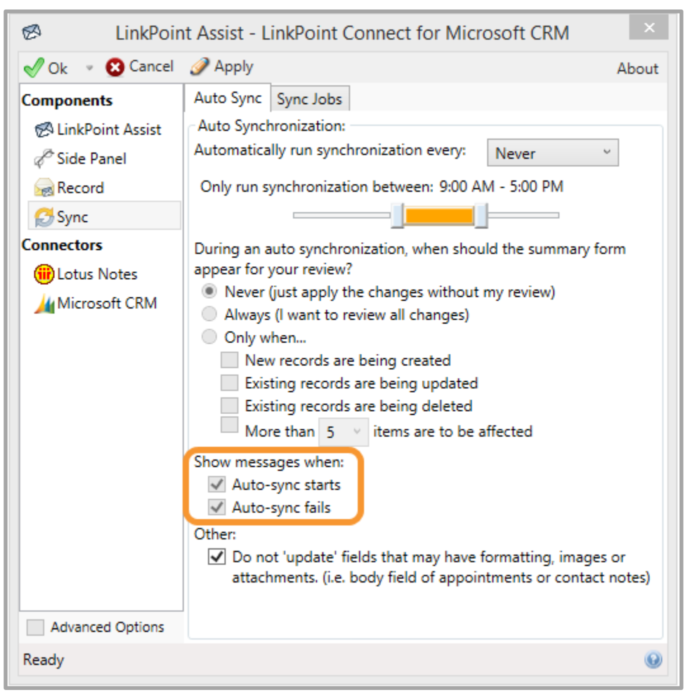
Tip: End users do not need to worry about misplaced appointments due to changes in time zones. LinkPoint Connect will run the sync based on the time zone where the end user computer is located. Calendar items are stored in Microsoft Dynamics CRM in GMT and then adjusted automatically for each user to match their end user.

5 Determine if and when the Synchronization Summary window should be displayed.



Tip: Auto Sync is designed to run with limited to no user interaction. Users can choose to set notifications to confirm when specific sync actions occur.

6 Select the checkboxes for the **Show messages when** options to enable pop-up notifications in the System Tray.



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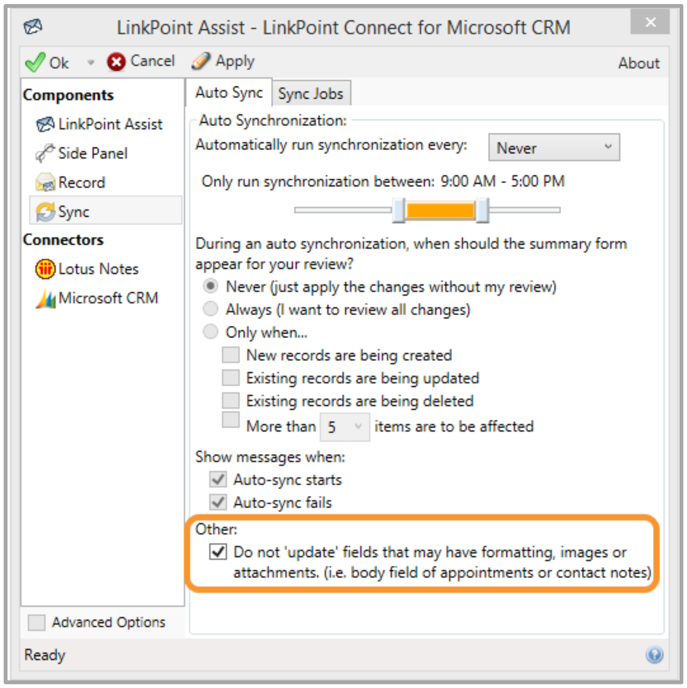
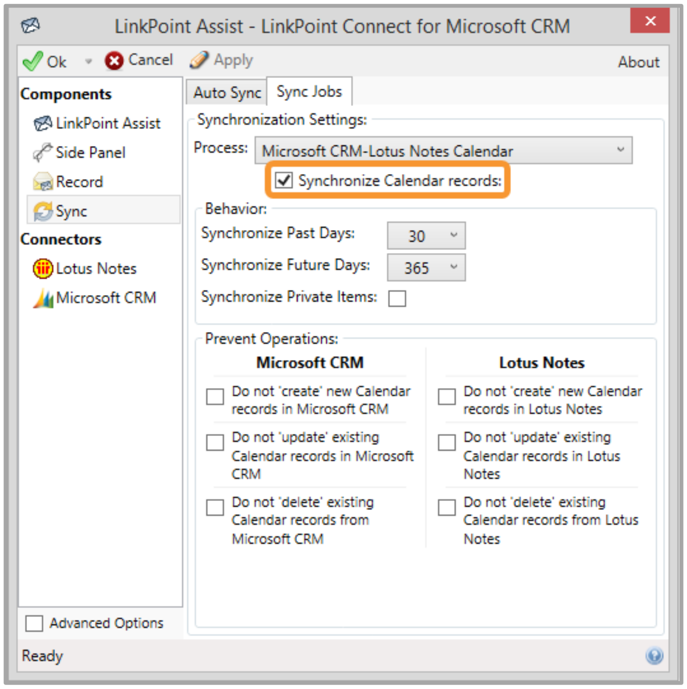
Select the checkbox in the **Other** section of the Auto Sync tab to prevent LinkPoint Connect from updating records in IBM Notes that have been changed in Microsoft Dynamics CRM if the original record content contained special formatting.



Example: For example, a user may have a calendar item in IBM Notes that contains special formatting (such as unique fonts or colors). When the item syncs to Microsoft Dynamics CRM, the original item retains its formatting in IBM Notes, but the copy of the item in Microsoft Dynamics CRM loses the formatting due to Microsoft Dynamics CRM limitations. If the user makes a change to the item in Microsoft Dynamics CRM, LinkPoint Assist may try to sync the most updated version back to IBM Notes, depending on user settings. Selecting this option will prevent LinkPoint assist from overwriting the original body content in IBM Notes, thus preserving the formatting. Other details, such as meeting date or time, will still update if necessary.

8

Select the **Sync Jobs** tab in the LinkPoint Assist window and confirm that the **Synchronize** checkbox is selected for the items that should run in the Auto Sync.

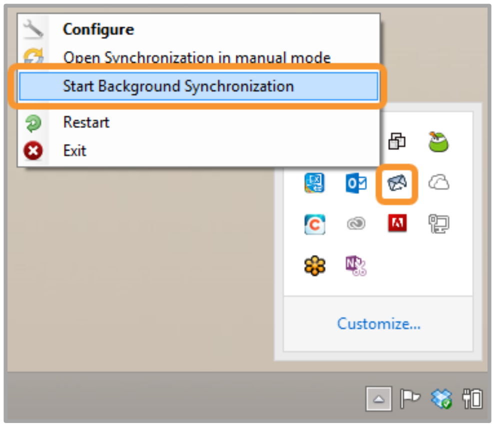


Tip: You will need to select the Process and then select the Synchronize checkbox for each item (i.e. Calendar, Contact, Task) that should be run in the Auto Sync.

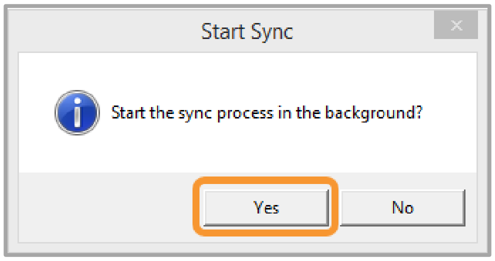
Running Background Synchronization with Auto Sync Settings

Users can force LinkPoint Connect to run a synchronization in the background based on existing Auto Sync rules at any time. In some cases, users set the Auto Sync frequency to longer intervals between each sync. Users may create a batch of appointments or import a list of contacts that they need available in both IBM Notes and Microsoft Dynamics CRM sooner than the next sync time.

1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Start Background Synchronization.**



2 Click **Yes** to confirm the background synchronization.



3 Note that the system will provide a notification if the sync fails. Otherwise, the sync will run in the background with no additional notification or user interaction.

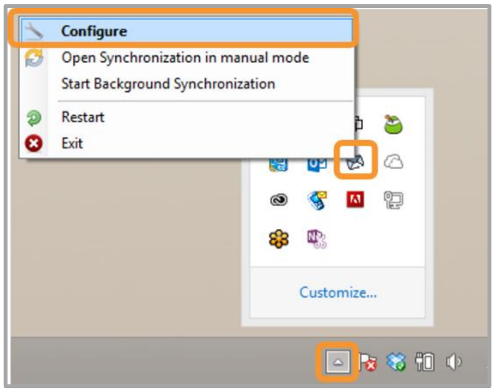
Rebuilding LinkPoint Connect Sync History

LinkPoint Connect enables users to set robust and highly configurable synchronization settings for both manual and automatic synchronization of contacts, calendars, and tasks. In the event that a user syncs their data in a way that does not meet their workflow needs, LinkPoint Connect includes a Rebuild History feature that can be used to reset the prior synchronization. Users can then reset their synchronization preferences between Microsoft Dynamics CRM and IBM Notes to better suit their needs. In this section, you will learn how to use the Rebuild History feature to reset your synchronization settings.

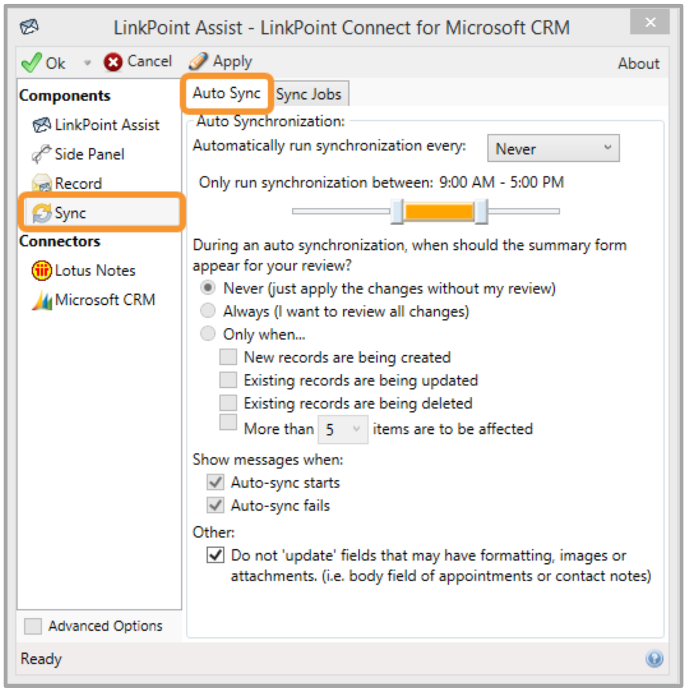
Warning: The Rebuild History feature does not unsync any items that were created, updated, or deleted within Microsoft Dynamics CRM or IBM Notes during the last synchronization. Rebuild History removes the relationships created between the systems with the sync preferences to prevent the same incorrect sync from running again.

Example: In this example, we will run the Rebuild History feature on the Task synchronization. The process is the same for using Rebuild History with Calendar and Contact sync.

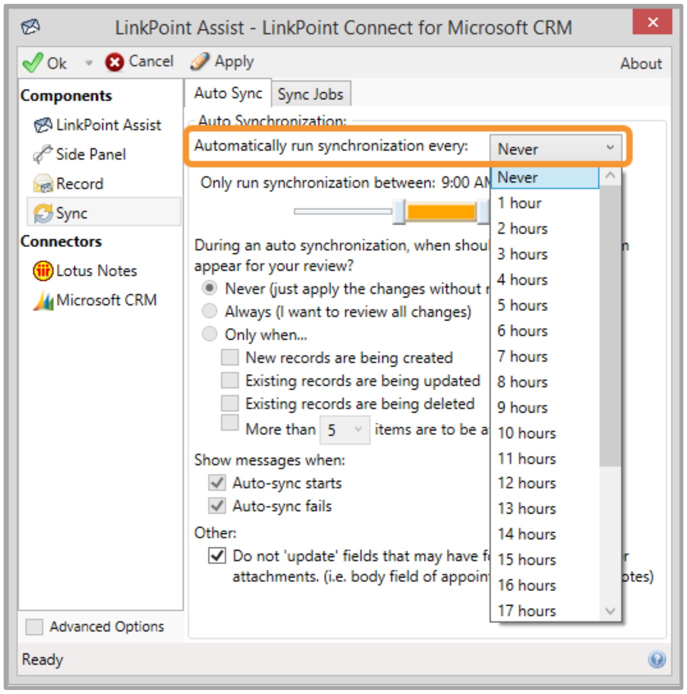
1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure.**



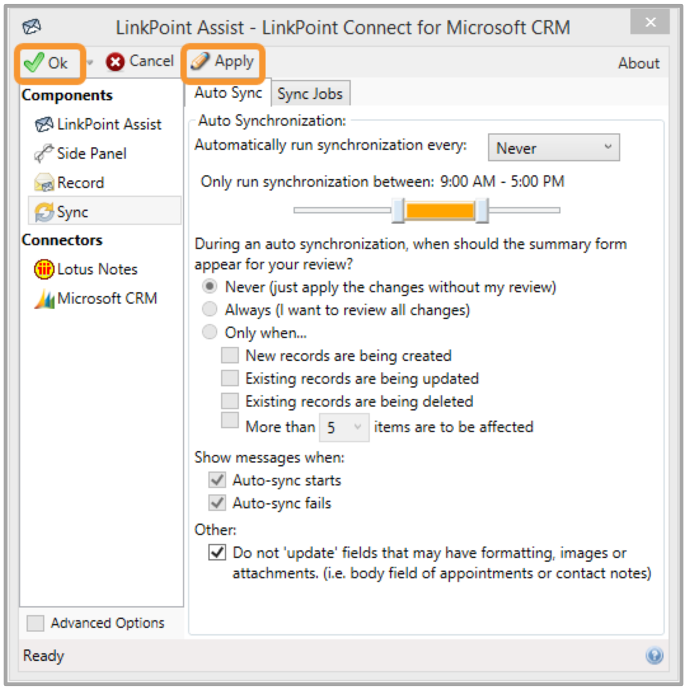
2 Select **Sync** from the **Components** list on the left side of the **LinkPoint Assist** window, and select the **Auto Sync** tab.



3 Select **Never** from the **Automatically run synchronization every** drop-down list to disable Auto Sync. This will prevent additional sync issues from occurring while running the Rebuild History.

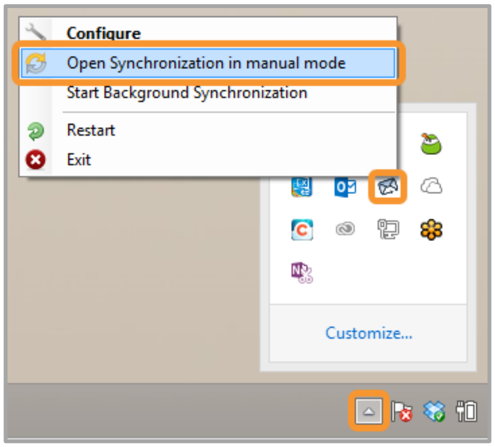


4 Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



5 Remove or update any items within Microsoft Dynamics CRM or IBM Notes that were affected by prior sync as needed.

6 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Open Synchronization in manual mode**.



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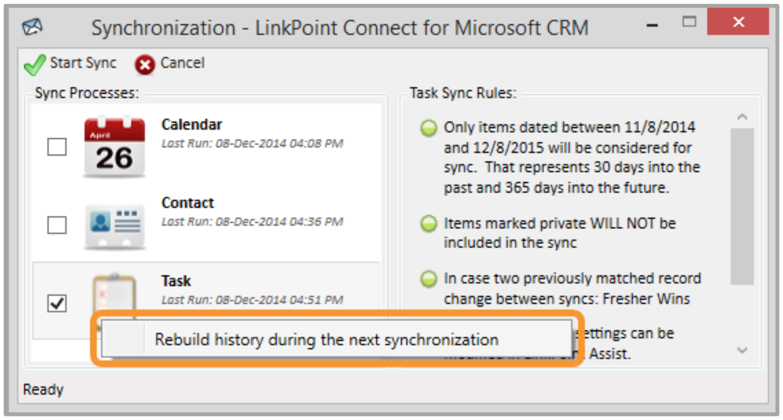
Right click the **Calendar**, **Contact**, or **Task** icon in the **Synchronization** window, and select **Rebuild history during the next synchronization**.



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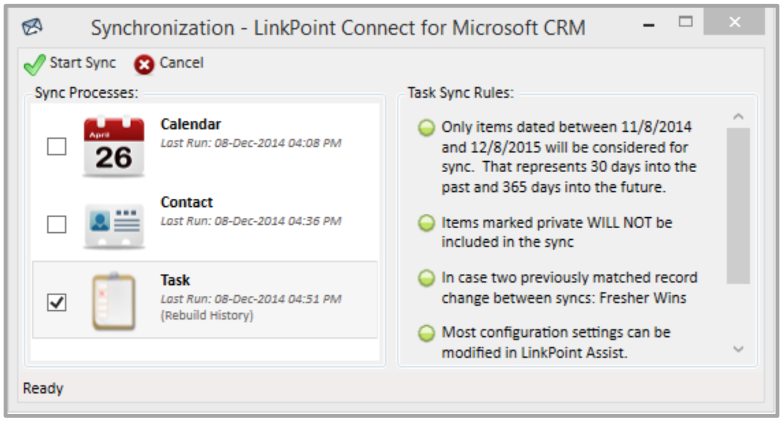
Click the **Start Sync** button and proceed with running the Manual Sync.



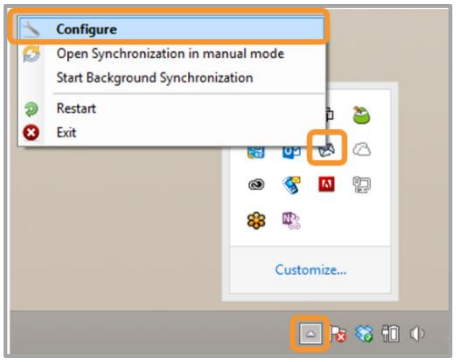
Additional Resources: You can read more about **Syncing Tasks between IBM Notes and Microsoft Dynamics CRM with Manual Sync**, as well as other Manual Sync options and features, earlier in this User Guide.

Configuring LinkPoint Connect

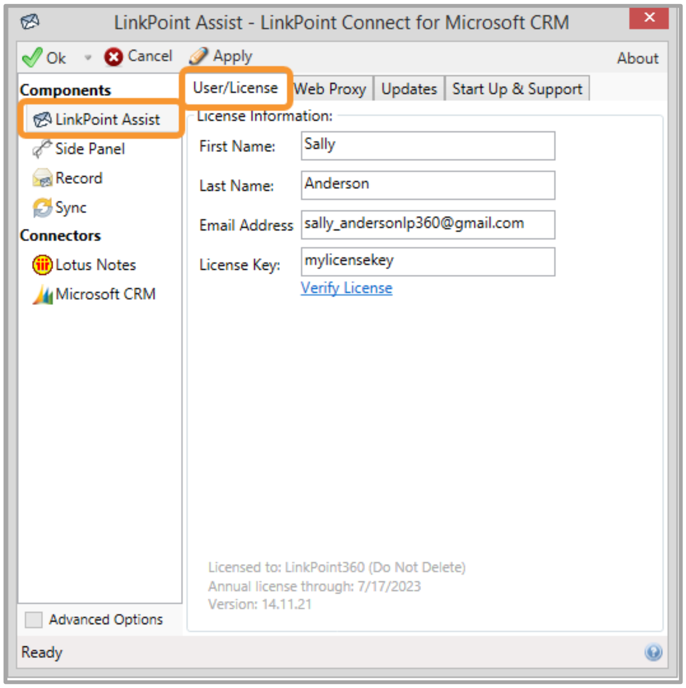
Configuring LinkPoint Assist

LinkPoint Assist guides users through simple configuration processes to adapt LinkPoint Connect to individual and organizational needs. Various settings are available for managing the way that LinkPoint Connect displays Microsoft Dynamics CRM data, records emails, and syncs information between systems. There are also several useful connectors available for advanced users who want to include even more integration within their LinkPoint Connect Side Panel. In this section, you will learn how to configure general LinkPoint Assist settings for managing License Key, Web Proxy, Updates, and Support.

1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure.**



2 Select **LinkPoint Assist** from the **Components** list on the left side of the **LinkPoint Assist** window, and select the **User/License** tab.



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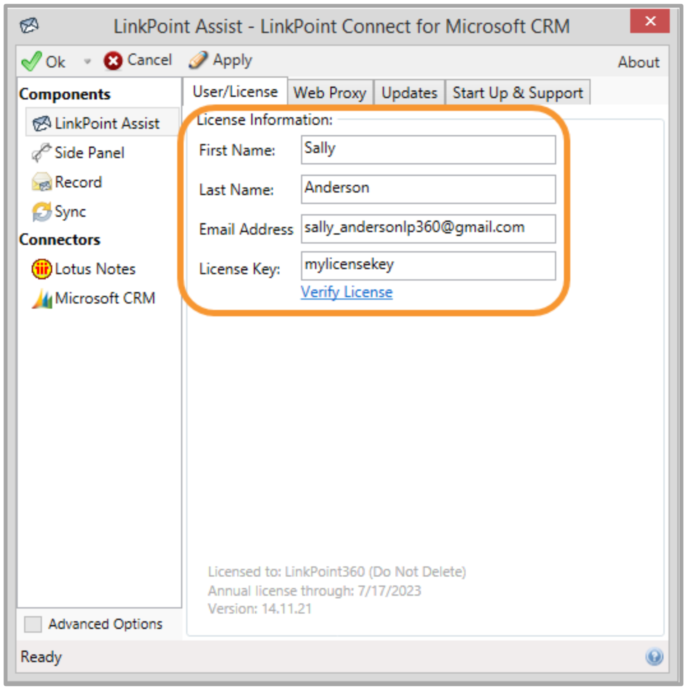
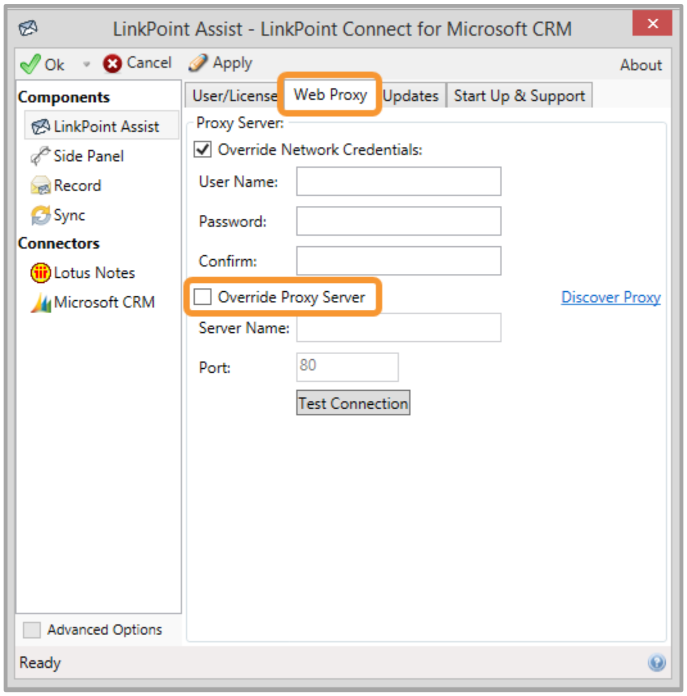
Manage **License Information** including user details or select **Verify License** as needed.



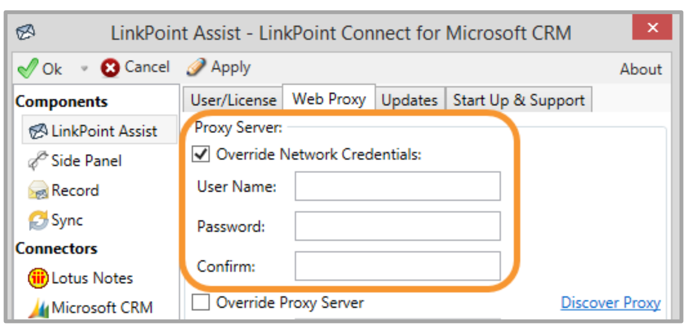
Additional Resource: Refer to the **Entering a License Key** section of this User Guide for more information on this configuration section.

4

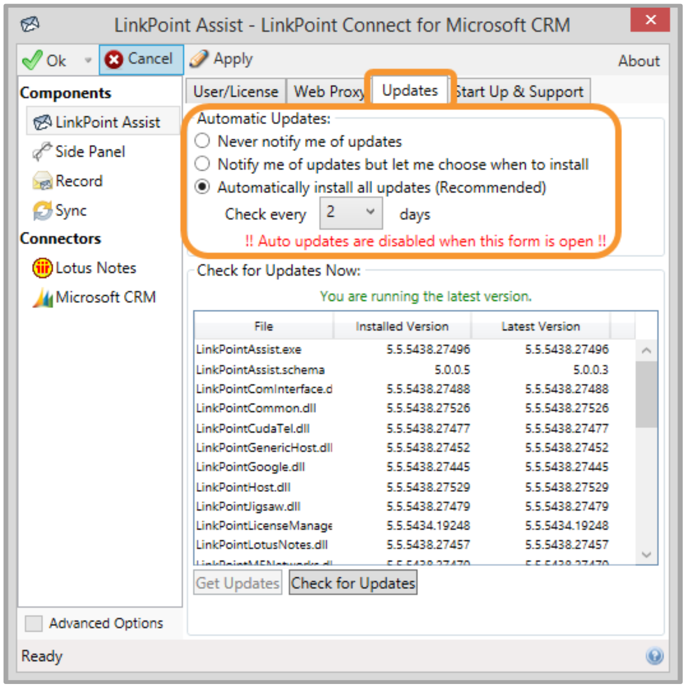
Select the **Web Proxy** tab. If working behind a proxy, select the **Override Proxy Server** checkbox and click the **Discover Proxy** link. This will attempt to automatically detect the proxy server name and fill in the **Server Name** and **Port** fields.



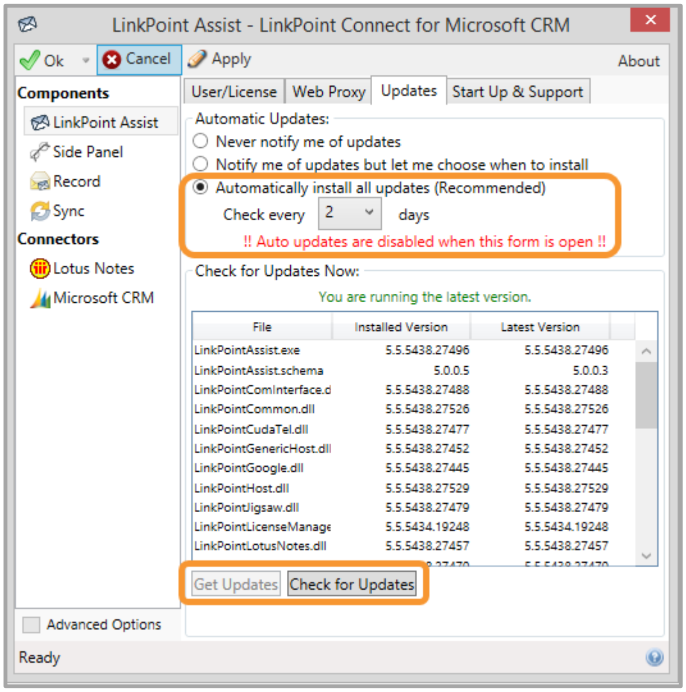
Tip: If you are required to provide credentials to get through the web proxy, select the **Override Network Credentials** checkbox and enter your **User Name** and **Password**. Click the **Test Connection** button to confirm that the Web Proxy is configured correctly.



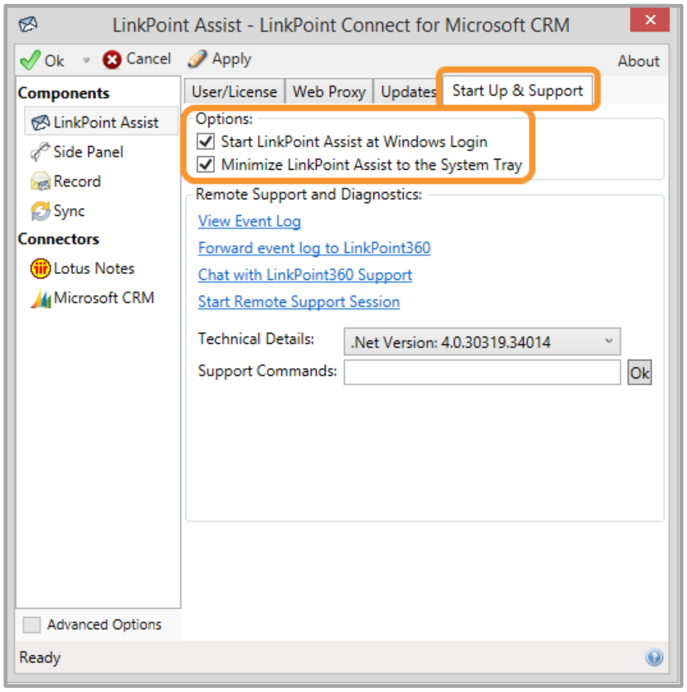
5 Select the **Updates** tab and select an option for **Automatic Updates**. Users can choose to let updates run automatically, approve updates before they are installed, or prevent updates altogether. Users can also set how frequently the software should check for updates with the **Check every X days** drop-down list.



Tip: LinkPoint Connect is set by default to **Automatically install all updates** and will check for updates every two days. If you change the Automatic Updates settings, you can use the **Check for Updates** and **Get Updates** buttons at the bottom of the LinkPoint Assist window.

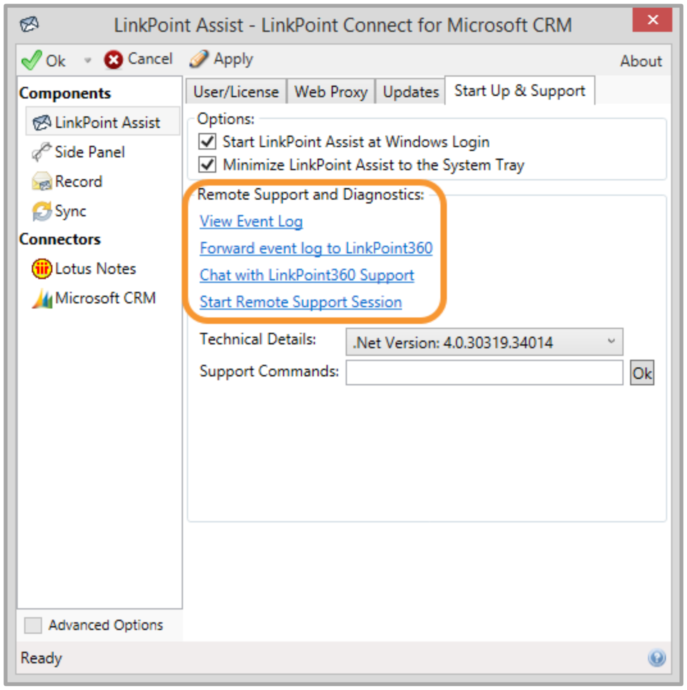


6 Select the **Start Up & Support** tab. Select or deselect the options to **Start LinkPoint Assist at Windows Login** and to **Minimize LinkPoint Assist to the System Tray** based on user preference.



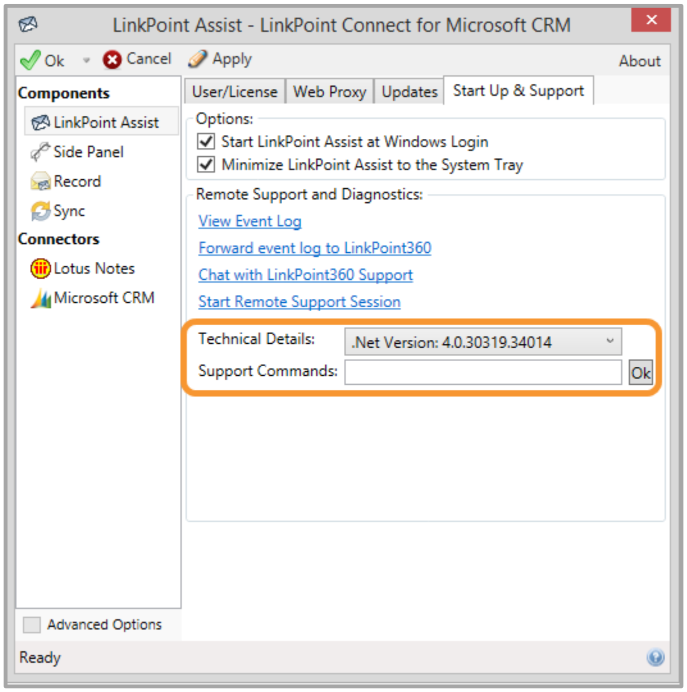
7 Select from available **Remote Support and Diagnostics** options when working with or reaching out to the LinkPoint360 Support Team.

- **View Event Log:** Click to generate an event log when requested by LinkPoint360 Support
- **Forward event log to LinkPoint360:** Click to send the event log to LinkPoint360 Support
- **Chat with LinkPoint360 Support**: Click to launch ChatBrowser and reach a live LinkPoint360 Support Team member
- **Start Remote Support Session**: Click to join a GotoMeeting session if you have been provided with a Meeting ID from LinkPoint360 Support.



Tip: The **Start Up & Support** tab includes additional tools used by the LinkPoint360 Support team when troubleshooting issues for customers.

- **Technical Details:** Information about your system to give support personnel insight
- **Support Commands:** Access to run additional support tools and shortcuts



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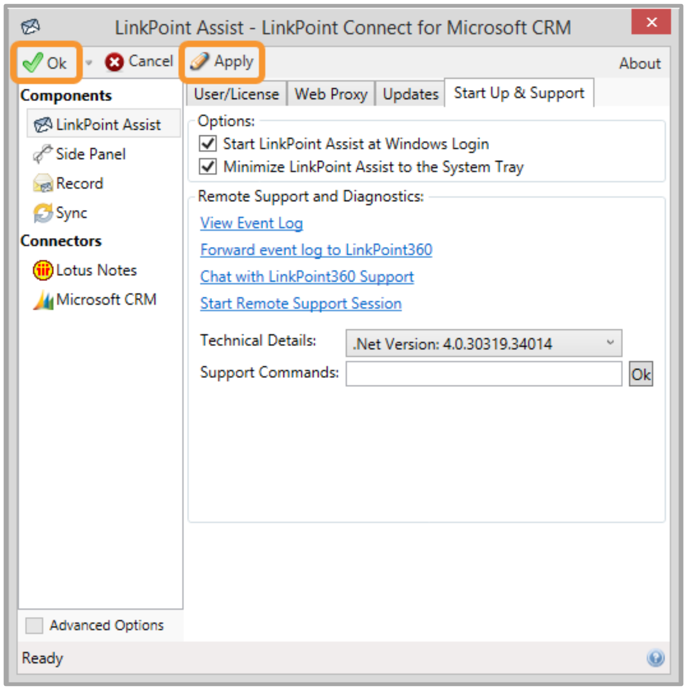
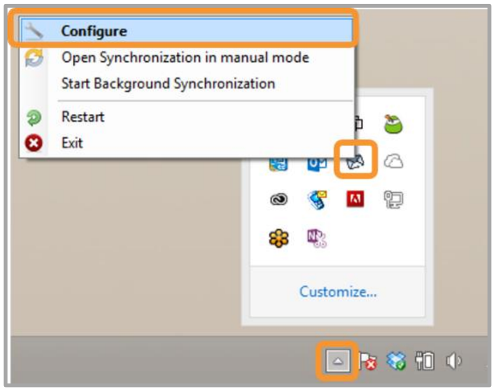
Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



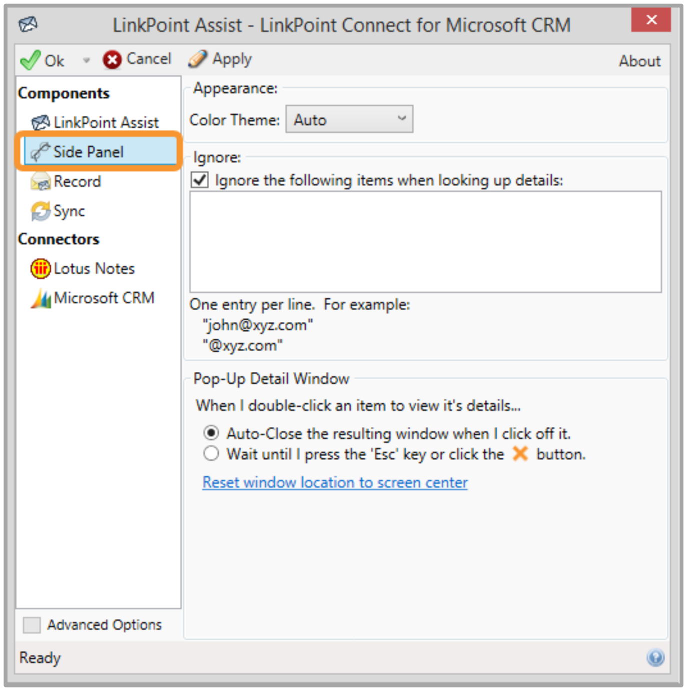
Configuring the LinkPoint Connect Side Panel

LinkPoint Assist guides users through simple configuration processes to adapt LinkPoint Connect to individual and organizational needs. Various settings are available for managing the way that LinkPoint Connect displays Microsoft Dynamics CRM data, records emails, and syncs information between systems. There are also several useful connectors available for advanced users who want to include even more integration within their LinkPoint Connect Side Panel. In this section, you will learn how to modify several settings that impact the display of information in the LinkPoint Connect Side Panel.

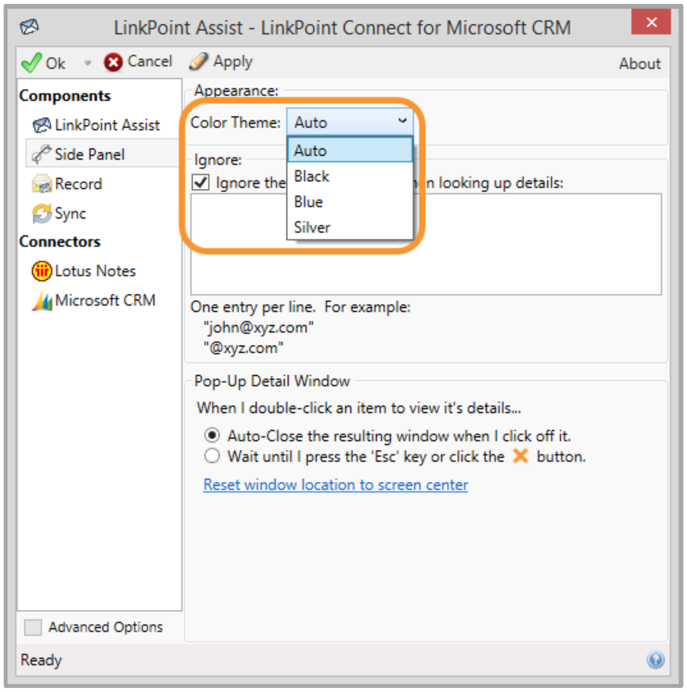
1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure.**



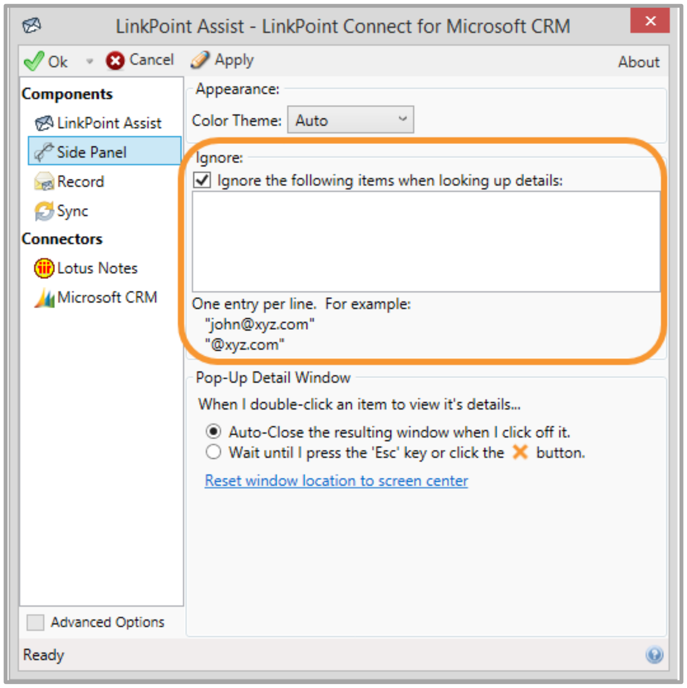
2 Select **Side Panel** from the **Components** list on the left side of the **LinkPoint Assist** window.



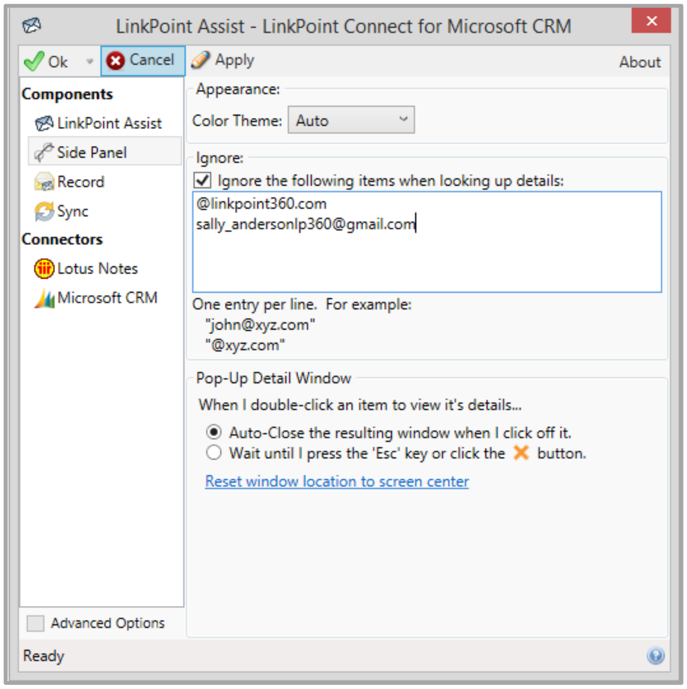
3 Select a **Color Theme** from the drop-down list to change the **Appearance** of the Side Panel. Note that **Auto** is the default option.



4 Select the **Ignore the following items when looking up details:** checkbox to specify email addresses to exclude from the Side Panel. Enter the content into the field box with one item on each line.

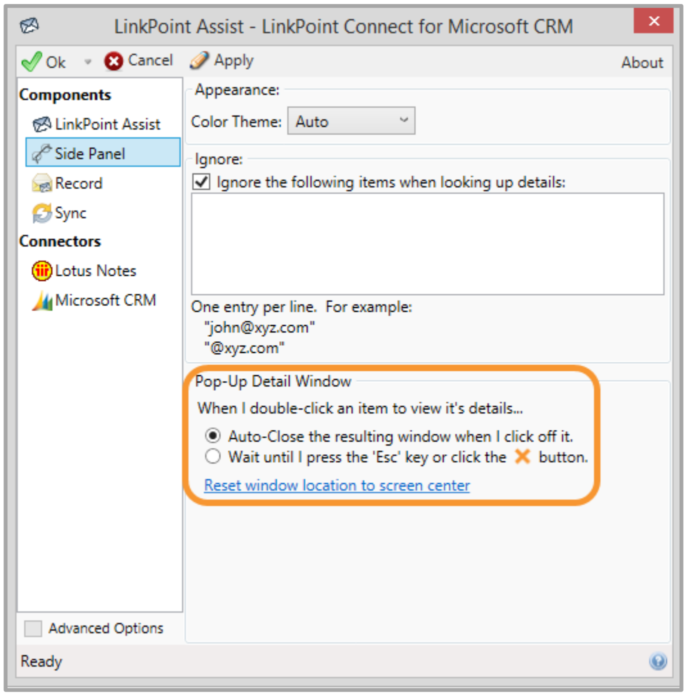


Tip: This is especially useful for excluding yourself or others in your organization from the Search Results or Contact List.



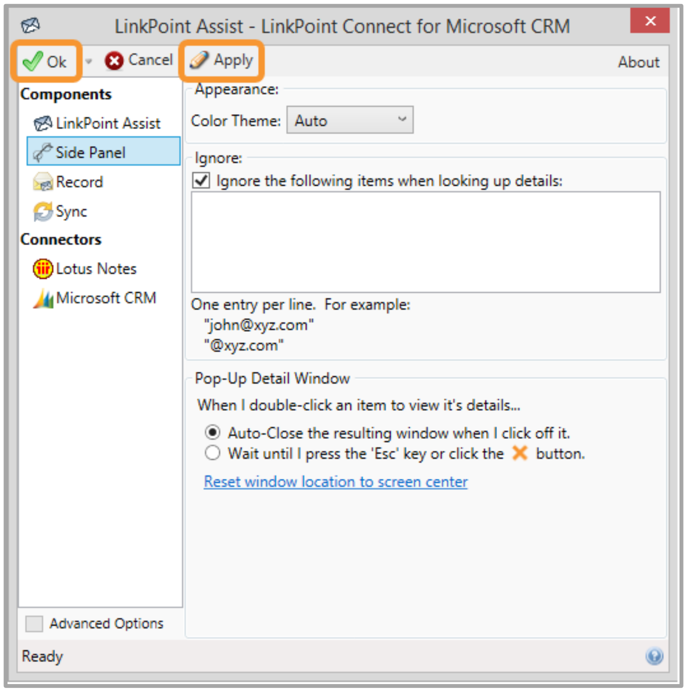
5

Select preferred settings for the **Pop-Up Detail Window** that is displayed when double clicking on items in the Side Panel. The window can be set to close when clicking away from it or when clicking the close icon.



6

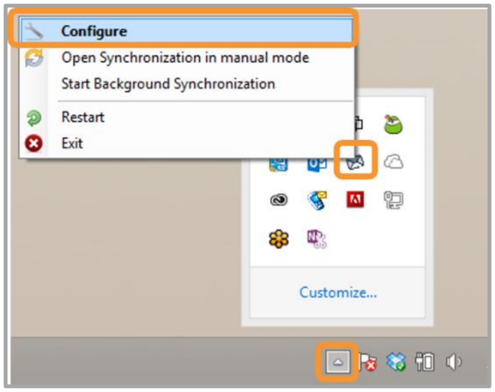
Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



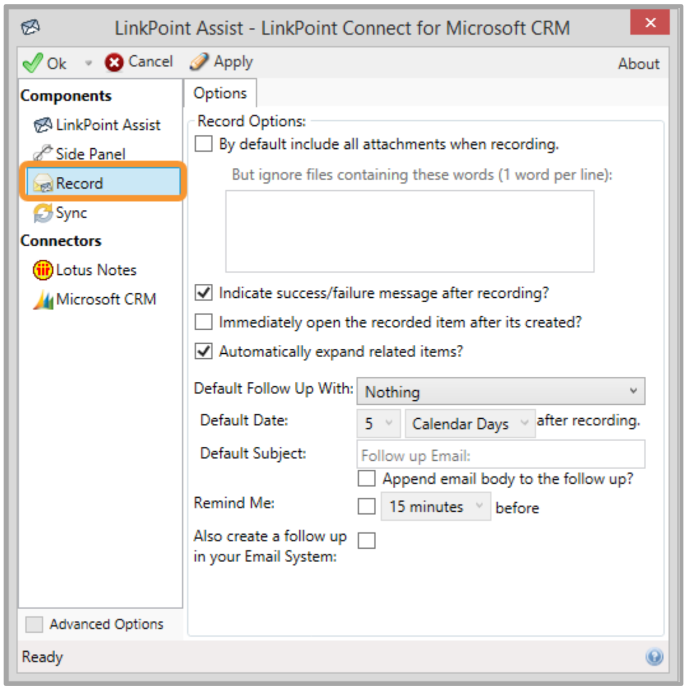
Configuring LinkPoint Connect Record Functionality

LinkPoint Assist guides users through simple configuration processes to adapt LinkPoint Connect to individual and organizational needs. Various settings are available for managing the way that LinkPoint Connect displays Microsoft Dynamics CRM data, records emails, and syncs information between systems. There are also several useful connectors available for advanced users who want to include even more integration within their LinkPoint Connect Side Panel. In this section, you will learn how to modify several settings that impact how, when, and what items are recorded to Microsoft Dynamics CRM from IBM Notes.

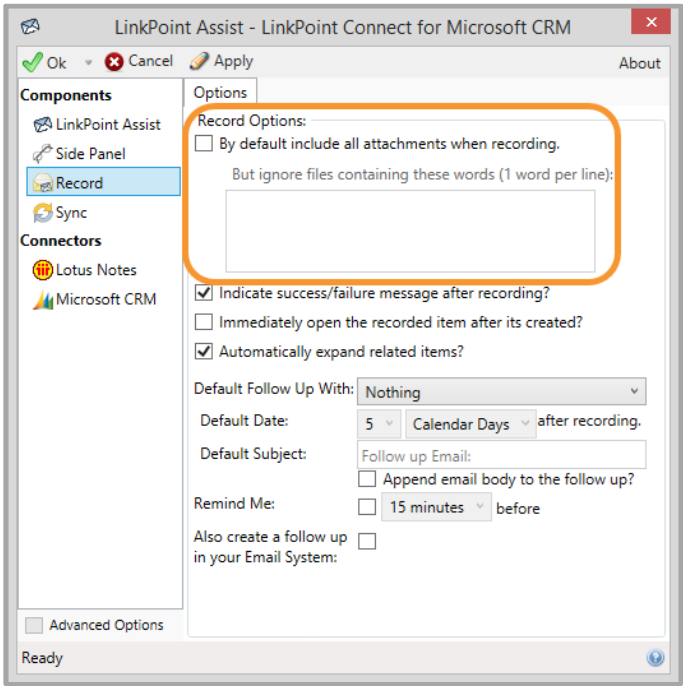
1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure.**



2 Select **Record** from the **Components** list on the left side of the **LinkPoint Assist** window.



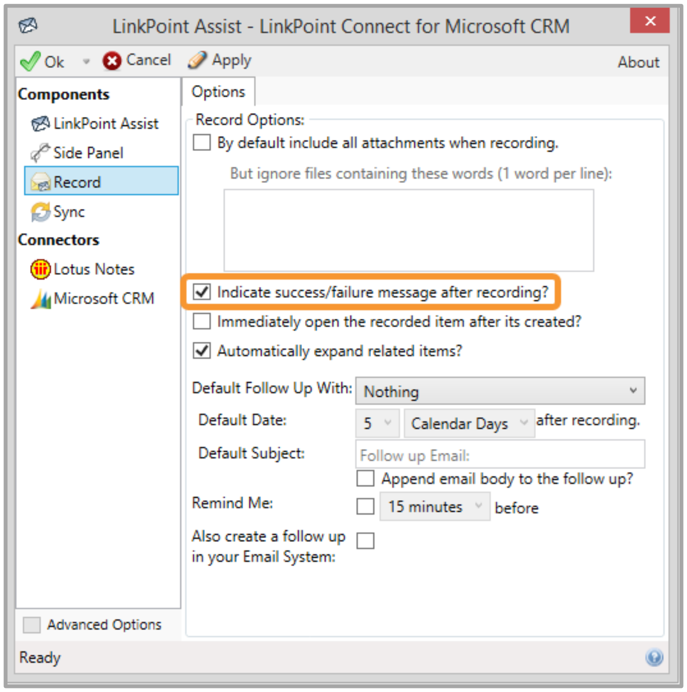
3 Set whether attachments should be recorded by default by selecting the corresponding checkbox. Indicate which file types to exclude from this by entering the file names or types in the field box.



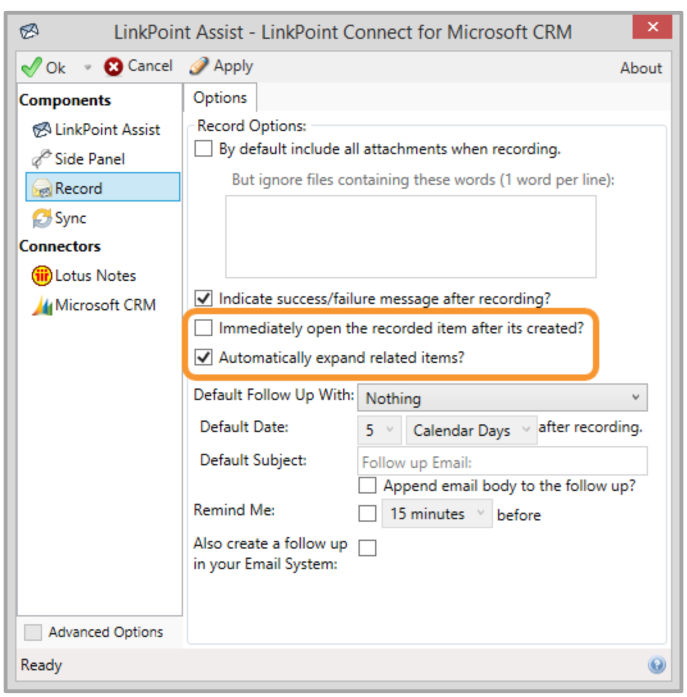
Example: You can list file extensions such as *.png* or *.jpg* to screen out images commonly found in email signatures. You can filter out files with words such as *brochure* or *pricing* to exclude items you commonly send to people that do not need to be saved over and over again in Microsoft Dynamics CRM, especially if they are already in your Microsoft Dynamics CRM Sales Literature.

Tip: Note that by default, this option is turned off to prevent unnecessary items from being recorded to Microsoft Dynamics CRM and counting against storage limits.

4 Select the **Indicate success/failure message after recording** checkbox to display or hide pop-up notifications after recording items.

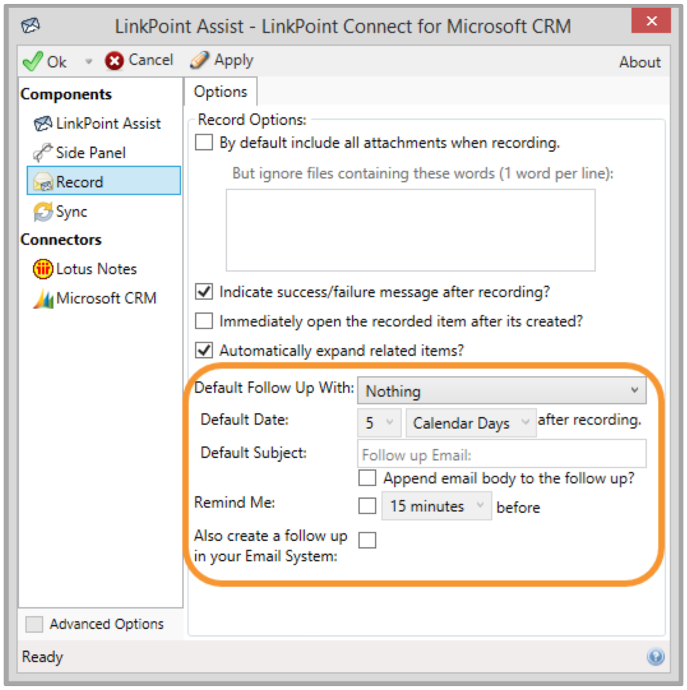


5 Select the additional **Record Options** based on user or company workflow preference.



6

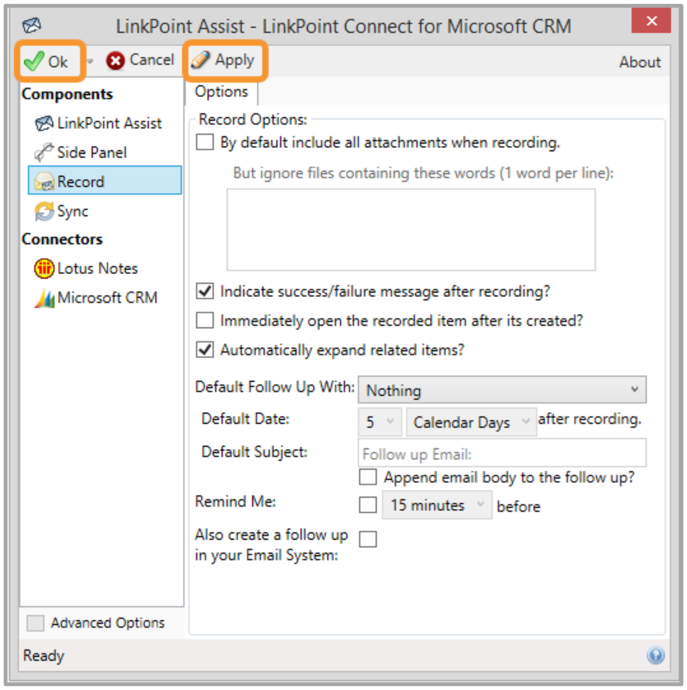
Set the preferred default Follow Up options for use during the recording process. By default, LinkPoint Connect is configured with **Nothing** as the follow up option.



Tip: This feature is helpful for users who set similar or repetitive follow up actions when recording emails.

Example: A user who typically schedules a Task to follow up with the related contact 5 days after recording the item with a Subject of *Reach out to prospect regarding status* would set these parameters once within LinkPoint Assist and then access them during the recording process from the Record window.

7 Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.

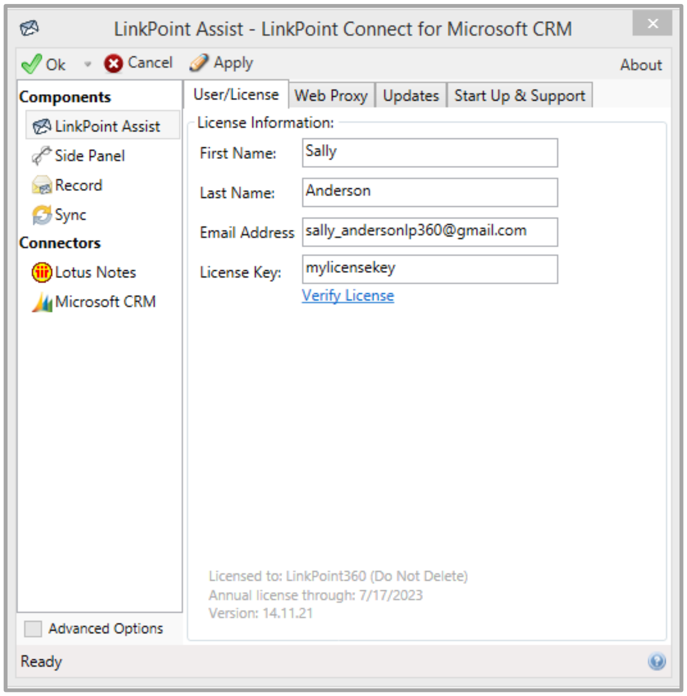


Working with LinkPoint Connect Contextual Help

Finding Knowledge Base Articles within LinkPoint Connect

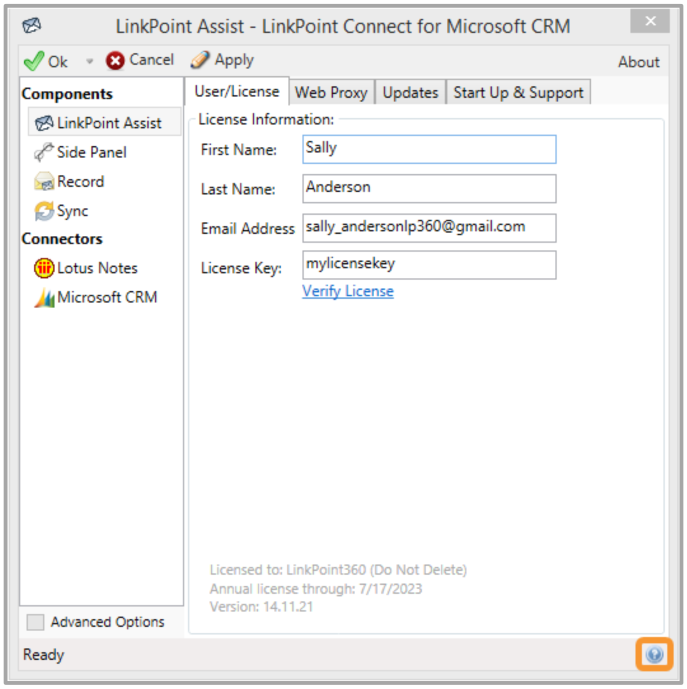
LinkPoint360 offers comprehensive knowledge base articles and help documentation online at www.linkpoint360.com/kb. LinkPoint Connect now includes contextual help links within the software itself. As users view Side Panel details, record emails, or change settings in LinkPoint Assist, they can click the new help icon to navigate directly to knowledge base articles. Contextual Help kicks off the first wave of completely reworked LinkPoint Connect help documentation, with more articles and new videos. In this section, you will learn how to access LinkPoint Connect Contextual Help Content.

1 Open any LinkPoint Connect screen, such as the LinkPoint Connect Side Panel, Record window, Regarding window, or LinkPoint Assist.

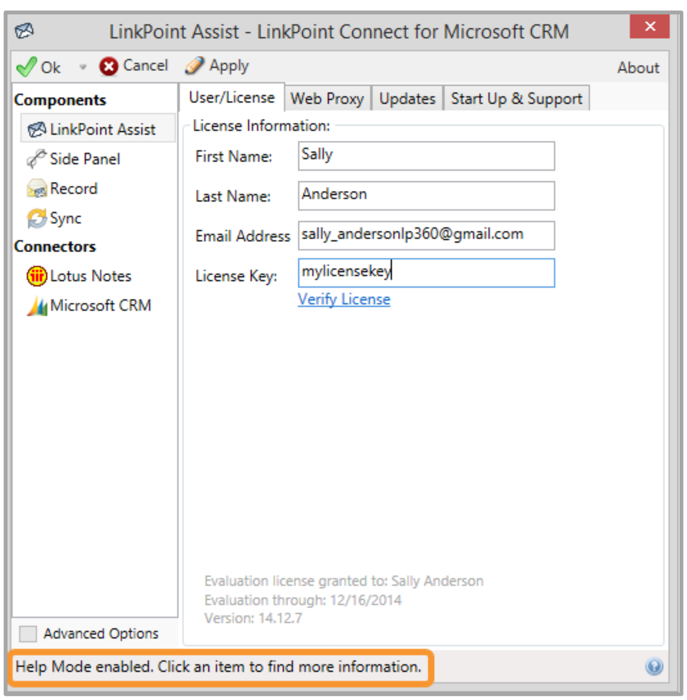


Example: In this example, we will demonstrate Contextual Help using LinkPoint Assist.

2 Click the **Help Mode** icon in the bottom right corner of the window.



3 Click a field or field label inside the window for more information. Note that the bottom of the window indicates that the window has **Help Mode enabled**.



4 Review the related help information in the LinkPoint360 Knowledge Base, which will launch in the Internet browser.