

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.

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**.





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



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

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

불 LinkPoint for Microsoft CRM - InstallShield Wizard				
CinkPoint 360	Welcome to the InstallShield Wizard for LinkPoint for Microsoft CRM			
	The InstallShield(R) Wizard will install LinkPoint for Microsoft CRM on your computer. To continue, dick Next.			
	WARNING: This program is protected by copyright law and international treaties.			
	< Back Next > Cancel			



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

License A Please re	greement				
	ad the following license agreem	ent carefully.	🖾 Lir	nk <mark>Point</mark>	360
	Software Lic	ense Agree	ment		^
This Softwa between Li Suite 2, Red MUST ENTE SOFTWARE ACKNOWLE AGREEING ARE ENTER which you	ITE License Agreement ("Agreen IkPoint360 ("Licensor") with its J Bank, NJ 07701, and you ("Lice R INTO THIS AGREEMENT IN OR AS LICENSED IN SECTION 2 HE EDGE THAT BY CLICKING THE "A TO ALL OF THE TERMS AND CO ING INTO A LEGALLY BINDING (Lick the "ACCEPT" button on this	ment") is a valid ar principal place of I ensee" or "You"). DER TO USE OR C REUNDER. YOU F ACCEPT" BUTTON INDITIONS OF THIS CONTRACT. You is page shall be the	d legally binding a pusiness at 68 WF YOU UNDERSTA OPY THE LICENSE URTHER UNDERS ON THIS PAGE, Y & AGREEMENT, AT further agree that effective date of	Igreement ite Street, ND THAT YOU OR TAND AND OU ARE ND THAT YOU the date on this	*
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O I do not a	accept the terms in the license a	greement			
InstallShield -					
	Г				_

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.

₿	LinkPoint for Microsoft CRM - InstallShie	ld Wizard 🛛 🗕 🗆	×
Re	adme Information lease read the following readme information carefully.	S LinkPoint	360
	Please exit ye Email Applica before continu	our tion Jing.	
Install	Shield < Back	Next > Cancel	



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.

i ₿	LinkPoint for Microsoft CRM - Ir	nstallShield Wizard
Custor Select	n Setup t the program features you want installed.	CinkPoint 360
Click on	an icon in the list below to change how a feature is Lotus Notes	s installed. Feature Description
		This feature requires 4336KB on your hard drive.
Install to C:\Users	o: s\ \AppData\Roaming\LinkPoint360\Bin\ eld	Change
	Help Space < Back	Next > Cancel

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

岁 LinkPoint for Microsoft CRM - Ir	nstallShield Wizard
Ready to Install the Program The wizard is ready to begin installation.	CinkPoint 360
If you want to review or change any of your installation exit the wizard. Current Settings:	n settings, dick Back. Click Cancel to
Setup Type: Custom	
Destination Folder: C:\Users\ \AppData\Roaming\LinkPoint360\Bin\	
User Information: Name: LinkPoint360 Company:	
I InstallShield < Back	Install Cancel

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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.



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

岁 LinkPoint for	Microsoft CRM - InstallShield Wizard			
ChinkPoint 360	InstallShield Wizard Completed			
The InstallShield Wizard has successfully installed LinkPoint for Microsoft CRM. Click Finish to exit the wizard.				
	☑ Configure LinkPoint			
	< Back Finish Cancel			

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

able to use the product.



Launch the LinkPoint Assist window.

🕫 LinkPoin	nt Assist - Lin	kPoint Conn	ect for	Microsoft CRM	×
🖋 Ok 👒 😢 Cancel	🏈 Apply				About
Components	User/License	Web Proxy	Updates	Start Up & Support	
🔊 LinkPoint Assist	- License Inform	nation:			
Connectors	First Name:				
Hotus Notes	Last Name:				
Microsoft CRM	Email Addres	s			
	License Kev:				
	Electrise key.	Verify Licens	se		
	Evaluation lic Evaluation th	ense granted to rough: 11/21/2	o: Sally And 014	derson	
Advanced Options	Version Date	: 8/5/2014			
Ready					0



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**.

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





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



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

						-
🖉 LinkPoin	t Assist - Link	Point Con	nect for	Microsoft CR	M	×
🖋 Ok 👒 😣 Cancel	🥜 Apply				Abo	ut
Components Connectors	User/License	Web Proxy ation: Sally	Updates	Start Up & Sup	port	
Lotus Notes Microsoft CRM	Last Name: Email Address	Anderson sally_ander	sonlp360	@gmail.com]	
	License Key:	mylicensek Verify Licen	ey se			
	Evaluation lice Evaluation thr Version Date:	ense granted t ough: 11/21/2 8/5/2014	o: Sally And 2014	derson		
Advanced Options						
Ready						0





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.







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.

4	

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





-

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

	t Assist - LinkPoint C	onnect for Microsoft CRM	×	
V Ok V Ok Cancel	Apply	Shineet for Wilcrosoft CRW	About	
Components	Credentials:			
🐼 LinkPoint Assist	Authentication Type:	ActiveDirectory ~		
Connectors	Server Name:	ActiveDirectory		
Hotus Notes	Port Number:	InternetHosted		
🕌 Microsoft CRM		Uffice305 WindowsLiveCRM		
	Use HTTPS:			
	Organization Name/Id:			
	For Active Directory,	the user name and password are optio	nal.	
	Suggestion: Try	connection without any values first.		
	oser Name.			
	Password:			
	Confirm:			
		Test Connection		
Advanced Options				
Ready			0	



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.

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

LinkPoint Assist - LinkPoint Connect for Microsoft CRM					
🔊 Ok 👒 😢 Cancel	🥜 Apply	🖉 Apply Abo			
Components	Credentials:				
🔗 LinkPoint Assist	Authentication Type:	Office365 v			
& Side Panel	Server Name:	crm.dynamics.com v			
Record	Port Number:	443			
💋 Sync	Use HTTPS:		, I.I.I.I.I.I.I.I.I.I.I.I.I.I.I.I.I.I.I.		
Connectors		linknoint260	1		
Lotus Notes	Organization Name/Id:	inikpointoto			
M MICrosoft CRIM					
	User Name:]		
	Password:]		
	Confirm:				
		Test Connection	1		
		🎒 A test connection is advised			
Advanced Options					
Ready			0		



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.

🕫 LinkPoin	t Assist - LinkPoint C	onnect for Microsoft CRM	×
🖋 Ok 👒 😢 Cancel	🥜 Apply		About
Components Components Components Consectors Connectors Connectors	Credentials: Authentication Type: Server Name: Port Number: Use HTTPS: Organization Name/Id:	Office365 ~ crm.dynamics.com ~ 443 Iinkpoint360]
Microsoft CRM	User Name: Password: Confirm:	sallyanderson@linkpoint360.com Test Connection	
Advanced Options			
Ready			0

5

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.

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







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

8	LinkPoir	nt Assist - LinkPoint Connect for Microsoft CRM	×
🖋 Ok	🙁 Cancel	Apply	About
Compone Compone Linkf Consecto Sync Connecto Connecto Micro	ents Point Assist Panel ord s Notes osoft CRM	Credentials: Password: Confirm: Test Connection Options: Notes INI Search Path: %ProgramFiles%\ibm\notes\data\;%ProgramFiles%\ibm\not	
Advan	ceu options		
Ready			0



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.



H



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



3

Click the Yes button to confirm the installation.



4

LinkPoint
LinkPoint360: Installation of LinkPoint agents was successful.
(08/13/2014 16:28)
Please restart Lotus Notes to complete the installation.

 OK

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.

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

۲		Mai	il - Inbox - IBM	Notes			- 🗆 🗙
File Edit View Create	Actions Tools Wir	ndow Help					
Open 👻 🧮					2	🖌 👻 Search All	Mail Q
🔀 Sally Anderson - Mail	×						
Sally Anderson \equiv	LinkPoint - Nev	w • Reply •	Reply to All 🔻	Forward -	► · 1	T	÷ Show •
on Local 🛛 🖳	Record To CRM	1	ıbject			Date v	Size 🖉 🕨
Inbox	Smart Record t	o CRM	ivate Equity Agre	ement for Review	06/19/20	14 02:11 PM	86K 🥥 🗲
Drafts	Side Panel		estment Decisio	ı	06/19/20	14 02:11 PM	6K
Sent	Jake Smit	h Ba	alanced Fund Pla	n Agreement	06/19/20	14 02:11 PM	5K
Follow Up	Tom Jones	s Fo	ollow-Up re: Mutu	al Client Case Status	06/19/20	14 02:11 PM	6K
All Documents							
Junk	LinkPoint -			•			
Trash							
Chat History		Private Equi	ity Agreement	for Review			
Views	- La	Cc: tomjoneslp	n to: Sally Ande 360	irson		06/19/2014 <u>Sł</u>	4 02:11 PM now Details
Folders	History:	This mes	sage has been rep	lied to.			
Archive	 1 attachme 	nt					
• Tools	POF						
• Other Mail	Sample.pdf						
	Hi Sally,						^
	Attached is a cor	ov of the agreer	nent we discusse	d. Please let me kno	ow if you have a	any questions	\sim
		.,					· ·
					*	-••	ine 🔺

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

Ø	LinkPo	oint Con	nect		×
<mark>å</mark> 2	ltems 🔻	2	Se	arch mo	re ዖ
F	Fred J	ohnso erations C	n Officer	Cor	ntact
E 1 S	quity M .03 Route an Franc	anagemei e 18 cisco, CA	nt Comp 94117 📢	any, LLC	
F f	: 732.555 redlp360	5. 5656 @gmail.c	om		
Em	nail (1)				
lir R 6 H N v s s o	terest in eceived /16/2014 li Sally, 1y organ re are in olution t ur accou	Solutions ization is the mark that can h int manag	Provider rapidly (set for a lelp us s gement.	1 / Rece Pri: No growing a software treamlin 	ived: rmal and e
 1 2 2 2 	Email Account Appoint Task	t Opportu tment	inity		
	. 2			*	+/-



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.

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.

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



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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.

🔗 LinkPoir	nt Connect 🛛 🗖 🗙
🔒 2 Items 🔻 4	💈 Search more 🔎
Fred Johnson	Contact
Tom Jones	hnson
Chief Opera	ations Officer



В

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.

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.

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

	lcon	Action
	3	Displays the contact's address in Google Maps
	4	Displays driving directions
Contact	1	Opens the record in Microsoft Dynamics CRM
Equity Management Company, LLC 103 Route 18		Copies the current record to the email address book
San Francisco, CA 94117 📢 🚓 P: 732.555.5656 fredlp360@gmail.com	Do.	Records the selected email to the contact in Microsoft Dynamics CRM
account Opportunity (1)	÷	Creates a new item based on the related information

A



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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**.



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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.

Email		*
Activity Date Description	6/2/2014 From: fredIp360@gmail.com To: sallyandersonIp360@gmail.com Received: 6/2/2014 2:38:40 PM Subject: Interest in Solutions Provider Hi Sally, My organization is rapidly growing and we are in the market for a software solution that can help us streamline our account management. Please let me know when you have time for a call to discuss. Regards, Fred Johnson	< >
Ordered by field	name 1 of 2 🕨	



5

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

Email		*
Activity Date Description	6/2/2014 From: fredIp360@gmail.com To: sallyandersonIp360@gmail.com Received: 6/2/2014 2:38:40 PM Subject: Interest in Solutions Provider Hi Sally, My organization is rapidly growing and we are in the market for a software solution that can help us streamline our account management. Please let me know when you have time for a call to discuss. Regards, Fred Johnson	<
Ordered by field	name 1 of 2 🕨	

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.

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

🖂 Email	
Y Account Opportunity	
📅 Appointment	
🕗 Task	
	♦ +/-
â <i>🖉</i>	

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.

⇒ +/-	4	Show More Buttons	
	*	Show Fewer Buttons	
		Navigation Pane Options	
		Add or Remove Buttons	•



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.

Email
Y Account Opportunity
📆 Appointment
🕐 Task
🐝 Case
(9) Quote
Phone Call
♥ +/-
▲ <i>€</i>

3

Select Navigation Pane Options...





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.

۲	Navigation Pane Options
Display	y buttons in this order
	mail Move Up ccount Opportunity ppointment ask ase tuote
	OK Cancel

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.

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.

۲	Mail - Inbox - IBM Notes	- 🗆 🗙 🔞	\Lambda 🛛 LinkPoint Connect 🗧 🗆 🛛 🗡
File Edit View Create A	ctions Tools Window Help		🔓 1 Items 🔻 🤹 🛛 Search more 🔎
Open 👻 🛗	🗙 👻 Search Al	l Mail 🔍	
🔀 Sally Anderson - Mail 🚿		(No matching contacts
Sally Anderson \equiv	LinkPoint • New • Reply • Reply to All • Forward • 🖿 • 🟲 🏥 🎦 • More •	Show ▼	or leads found.
on Local 🛛 🐱	□ Who → Subject Date ▼	Size 🖉 🕨	michaeljameslp360@gmail.com
Inbox	Fred Johnson Updated Contract Status 11/04/2014 02:06 PM	5K	
Drafts	Fred Johnson Private Equity Agreement for Review 06/19/2014 02:11 PM	86K @ 🗲 🗸	
	Michael James Investment Decision 06/19/2014 02:11 PM	6K	
	Jake Smith Balanced Fund Plan Agreement 06/19/2014 02:11 PM	5K	
All Documents	Tom Jones Follow-Up re: Mutual Client Case Status 06/19/2014 02:11 PM	6K	
Trach			
Chat History			
	LinkPoint		
Folders	Investment Decision		
Archive	Michael James to: Sally Anderson 06/19/20	I4 02:11 PM show Details	
Tools			
Other Mail	Hi Sally,		
	I am writing to let you know that NGY Management has decided to go with the \$30 investment with our fund.	private	
	Regards,	~	+/-
	• ••••	Ala Online 🔺	<u>a</u> <u>a</u>

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.

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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.



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.

🛞 Investment Decision - IBM Notes – 🗆 🗙	🔗 LinkPoint Connect 🗕 🗆 🗙
File Edit View Create Actions Tools Window Help	🔒 1 Items 🔻 🤹 Search more 🔎
Open 🔻 🔀 🖩 🛛 🖉 - Search All Mail 🔍	
Sally Anderson - Mail 🗴 🔯 Investment Decision 🗴	No matching contacts
LinkPoint New Reply Reply to All Forward T 🖿 F 🖬 Display 🔾 More	or leads found.
	michaeljameslp360@gmail.com
Investment Decision Michael James to: Sally Anderson 06/19/2014 02:11 PM Show Details	
Hi Sally,	
I am writing to let you know that NGY Management has decided to go with the \$30 investment with our private fund.	
Regards,	
Michael James Vice President	
NGY Management Services, LLP 9346 Walker Street	
Boston, MA 02210	
32-555-1212	
	+/-
🔺 🔫 🚜 Online 🗠	

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

lcon	Action			
•	Creates a new Contact in Microsoft Dynamics CRM			
₽ .	Creates a new Lead in Microsoft Dynamics CRM			



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.

🎍 🗸 🏫 SALES 🤇	🗸 Leads 🛛 🗸 New Lead	\oplus	*	3	?
🕞 SAVE 🗳 SAVE & CLO	DSE + NEW / EDIT PROCESS		1	ŀ.	я
New	Lead	Lead Source Rating Status Warm New			
Qualify (Active)	Develop	> ₽ Propose > ₽ Close	→ Next	t Stag	ge
Summary					^
CONTACT		POSTS ACTIVITIES NOTES			Ш
Topic *	Investment	Enter post here	POST		11
Name*	Michael James	Both Auto posts User posts			11
Job Title Business Phone	Vice President 732-555-1212	We didn't find any posts.			Ц
Mobile Phone					
Email	michaeljameslp360@gmail.com				
Product Details					
Lead Product					
Est. Value					
Est. Close Date					
COMPANY					
Company *	NGY Management Services, LLP				
Website	URL				
Address	9346 Walker Street Boston, MA 02210				~

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.

۲	Mail - Inbox - IBM Notes 🛛 🗕 🗆 🗙			🧭 LinkPoint Connect 🗧 🗆	x t				
File Edit View Create A	ít View Create Actions Tools Window Help					🔒 1 Items 👻 🤹 Search mor	re 🔎		
Open 👻 🔛						🔀 👻 Search All	Mail Q		Lead
🔀 Sally Anderson - Mail 🛛 🛪	:							Michael James Vice President	
Sally Anderson \equiv	LinkPoint •	New - Re	eply • Reply to All •	Forward -	▶ · 🛍 🖸 ·	More -	Show ▼	NGY Management Services, LLP 9346 Walker Street	
on Local 🛛 🖳	⊠ !Who		Subject			Date 🔻	Size 🖉 🕨	Boston MA 02210 🐧 🚌	
Inbox	Fred J	ohnson	Updated Contract S	Status	11/04/2	014 02:06 PM	5K	P: 732.555.1212 michaeljameslp360@gmail.com	
Drafts	Fred J	ohnson	Private Equity Agre	eement for Review	06/19/2	014 02:11 PM	86K 🥝 🗲	<u>/4</u> ==	
Sent	Michae	el James	Investment Decisio	on	06/19/2	014 02:11 PM	6K	Appointment (0)	\$



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

0

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.



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

		New Calendar Entry for Sally Anderson - IBM Notes -	×
e Edit Viev	w Create Action	s Text Tools Window Help	
pen 👻 🖂		🛱 👻 Search All Calendar	٩
Sally Ander	rson - Mail ×	New Calendar Entry for Sally Anderson ×	
ave and Send	Invitations Save	as Draft Display▼ Delivery Ontions Check Calendar	
ave and cent			~
	🗌 High impor	tance 🗌 Return receipt 🔲 Sign 🔲 Encrypt	
	Calendar E	Entry Dotify Me 🔁	
	Type:	Meeting Mark Available	
	t Connact for Micr	acat CDM	
CITIKE OIL	t connect for Mich	USUICKIW	
Regarding			
Regarding :			
<u>Regarding</u> :			
Regarding	Introduction to	LiekPaiet260	
Regarding	Introduction to	LinkPoint360	
Regarding : Subject: When:	Introduction to Starts:	LinkPoint360 Mon 12/08/2014 II 02:00 PM C Local time	
Reqarding i	Introduction to Starts: Ends:	LinkPoint360 Mon 12/08/2014 II 02:00 PM C Local time I hour Mon 12/08/2014 II 03:00 PM C Local time I hour	
Regarding	Introduction to Starts: Ends: <u>Repeat</u>	LinkPoint360 Mon 12/08/2014 Image: Constraint of the second se	
Regarding : Subject: When: Who:	Introduction to Starts: Ends: Repeat	LinkPoint360 Mon 12/08/2014 Is 02:00 PM Local time Mon 12/08/2014 03:00 PM Is 03:00 PM Local time 1 hour This entry does not repeat Prevent counter-proposals Do not receive responses from invitees Prevent counter-proposals	
Regarding Subject: When: Who:	Introduction to Starts: Ends: <u>Repeat</u> <u>Required:</u>	LinkPoint360 Mon 12/08/2014 02:00 PM Local time Mon 12/08/2014 03:00 PM Local time 1 hour This entry does not repeat Do not receive responses from invitees Prevent counter-proposals Prevent delegation samuelwerthlp360@gmail.com, brandonwhitelp360@gmail.com, "Tom Jones"	
Regarding Subject: When: Who:	Introduction to Starts: Ends: Repeat Required: Optional:	LinkPoint360 Mon 12/08/2014 02:00 PM Mon 12/08/2014 03:00 PM Local time 1 hour This entry does not repeat 1 hour Do not receive responses from invitees Prevent counter-proposals Prevent delegation samuelwerthlp360@gmail.com, brandonwhitelp360@gmail.com, "Tom Jones"	
Regarding Subject: When: Who:	Introduction to Starts: Ends: Repeat. Required: Optional: FYI:	LinkPoint360 Mon 12/08/2014 02:00 PM Local time 1 hour Mon 12/08/2014 03:00 PM Local time 1 hour This entry does not repeat 03:00 PM Local time 1 hour This entry does not repeat Prevent counter-proposals Prevent delegation samuelwerthlp360@gmail.com, brandonwhitelp360@gmail.com, "Tom Jones"	
Regarding Subject: When: Who:	Introduction to Starts: Ends: Repeat Required: Optional: FYI:	LinkPoint360 Mon 12/08/2014 02:00 PM Local time 1 hour Mon 12/08/2014 03:00 PM Local time 1 hour This entry does not repeat 0 not receive responses from invitees Prevent counter-proposals Prevent delegation samuelwerthlp360@gmail.com, brandonwhitelp360@gmail.com, "Tom Jones"	*
Regarding Subject: When: Who:	Introduction to Starts: Ends: Repeat Required: Optional: FYI:	LinkPoint360 Mon 12/08/2014 02:00 PM Local time Mon 12/08/2014 03:00 PM Local time Mon 12/08/2014 03:00 PM Local time This entry does not repeat 1 hour Do not receive responses from invitees Prevent counter-proposals Prevent delegation samuelwerthlp360@gmail.com, brandonwhitelp360@gmail.com, "Tom Jones"	~



3

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

New Calendar Entry for Sally Anderson - IBM Notes	_ 🗆 ×
File Edit View Create Actions Text Tools Window Help	
Open 🚽 🖂 🧮	🛱 ᠇ Search All Calendar 🛛 🔍
Sally Anderson - Mail × 💼 New Calendar Entry for Sally Anderson ×	
Save and Send Invitations Save as Draft Display▼ Delivery Options Check Calendar	
High importance Return receipt Sign Encrypt Calendar Entry Type: Meeting	Mark Private Notify Me
LinkPoint Connect for MicrosoftCRM	

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.

OK Cancel			
Examplex	Reference	Selection	
Regarding ▲ Account Examplex Financial (account) ▲	regardin	y.	



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.

Ok 😣 Cancel		
earch: (0 items)	Reference Selection	
	GO Regarding:	
Regarding	4 Regarding	(Maximum 1 selected
Oppertunity Opp: Private Equity Deal O / In Progress	S Examplex F	inancial (account) 🏄

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.

Reference Selection - LinkPoi	int Connect for Microsoft CRM			
Ok Cancel Search: (0 items) Concentration A Opportunity Opp: Private Equity Deal 0 / In Progress	Reference Selection Regarding: Regarding (Maximum 1 selected) Account Examplex Financial (account)			
Select	ion Limit 🛛 🗙			
Microsoft CRM limits ' Consider removing pri	Regarding' selections to 1 item. or selections and trying again.			
	ОК			
	Refrech original items Remove All			
Ready	Ketresh original items Kemove All			



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

File Edit View Create Actions Text Tools Window Help	
Open 👻 🧮	🛱 👻 Search All Calendar 🛛 🕻
Sally Anderson - Mail × 💼 New Calendar Entry for Sally Anderson ×	
Save and Send Invitations Save as Draft Display▼ Delivery Options Check Calendar	
High importance Return receipt Sign Encrypt Calendar Entry Type: Meeting	Mark Private
LinkPoint Connect for MicrosoftCRM Regarding Examplex Financial	

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.

New Calendar Entry for Sally Anderson - IBM Notes	_ 🗆 🛛
File Edit View Create Actions Text Tools Window Help	
Open 👻 🧮	🖀 🚽 Search All Calendar 🛛 🔍
Sally Anderson - Mail ×	
Save and Send Invitations Save as Draft Display Delivery Options Check Calendar	
High importance Return receipt Sign Encrypt Calendar Entry Type: Meeting	▲ Mark Private □ Notify Me ເງ □ Mark Available



Creating a New Microsoft Dynamics CRM Opportunity from IBM Notes

0

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.

۲		Mail - Inbox - IBM N	otes			- 🗆 🛛	🐼 LinkPoint Connect 🗧 🗆	×
File Edit View Create	Actions Tools Window	v Help					🔒 2 Items 🔻 🤹 Search more	P
Open → 🔀 📰	×			2	🛛 🝷 Search All	Mail Q	Cont Fred Johnson Chief Operations Officer	tact
Sally Anderson \equiv	LinkPoint - New -	Reply • Reply to All • F	orward -	▶ • 💼	.	÷ Show •	Equity Management Company, LLC	
on Local 🛛 🐱	⊠ !Who	Subject			Date v	Size 🖉 🕨	San Francisco, CA 94117 🐧 🚓	
Inbox	Fred Johnson	Updated Contract Sta	itus	11/04/201	4 02:06 PM	5K	P: 732.555.5656 fredlp360@gmail.com	
Drafts	Fred Johnson	Private Equity Agreen	nent for Review	06/19/201	4 02:11 PM	86K 🥝 🗲	<u>// = 5</u>	
Sent	Michael James	Investment Decision		06/19/201	4 02:11 PM	6K	Account Opportunity (0)	÷
Follow Up	Jake Smith	Balanced Fund Plan	Agreement	06/19/201	4 02:11 PM	5K		
All Documents	Tom Jones	Follow-Up re: Mutual	Client Case Status	06/19/201	4 02:11 PM	6K		
Junk								
Trash	LinkDaintz		•					
Chat History	LINKPOINT ·							
Views	Priv	vate Equity Agreement f	or Review					
Folders	Fre Gr	d Johnson to: Sally Anders tomionesin360	on		06/19/201	4 02:11 PM		
Archive	History:	This message has been replie	ed to.		<u>.</u>			
Tools	 1 attachment 						Account Opportunity	
Other Mail	PDF						Contact Opportunity	
	Sample.pdf						Email	
							Appointment	
	Hi Sally,					^	() Task	
						~		+/-
				^	-0	Ala Online -	L & X	

2

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

🖉 LinkPoint Conn	ect – 🗆 🗙
🔒 2 Items 🔻 🦈	Search more 🔎
Fred Johnson	Contact
Equity Management 103 Route 18	Company, LLC
San Francisco, CA 94 P: 732.555.5656	117 🐧 🚓
fredlp360@gmail.com	n
Account Opportur	nity (0) 🔛



4

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.

Microsoft Dynam	nics CRM 🗸 🏦 SALES 🗸 🛛	Opportunities 🗸	New Opportunity	6	Create	¢?
G SAVE G SAVE & C	LOSE 🕂 NEW 🖋 EDIT PROCESS					r ↓ ⊅
New Op	oortunity					
Est. Close Date	Est. Revenue Status In Progress					
Qualify (Active)	Develop		Propose	>	Close	→ Next Stage
Summary						Â
Topic *		POSTS ACTIVITIES	NOTES			
Account	Equity Management Company, L	Enter post here		POST	STAKEHOLDERS	
Purchase Timeframe		Both Auto posts U	lser posts		Name 🛧	Role
Currency *	US Dollar	We didn't find only r	aasts		To enable this content, crea	te the record.
Budget Amount		we didn't find any p	P0515.			
Purchase Process						
Description						

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.

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.

۲		Mail - Inbox - IBM	Notes			- 🗆 🛛	🗐 LinkPoint Connect 🛛 – 🗆 🗙
File Edit View Create	Actions Tools Window	Help					🔓 2 Items 🔻 🤹 Search more 🔎
Open → 🕅 🏢	×			×	🛛 🗕 Search All	Mail Q	Contact Fred Johnson Chief Operations Officer
Sally Anderson \equiv	LinkPoint - New -	Reply - Reply to All -	Forward -	► · 🗎	- 13	Show •	Equity Management Company, LLC
on Local 🛛 🚟	⊠ ¦Who ∧	Subject			Date v	Size 🖉 🕨	San Francisco, CA 94117 🐧 🚓
Inbox	Fred Johnson	Updated Contract S	Status	11/04/201	4 02:06 PM	5K	P: 732.555.5656 fredlp360@gmail.com
Drafts	Fred Johnson	Private Equity Agre	ement for Review	06/19/201	4 02:11 PM	86K Ø 🗲	<u>///</u> 📖 🖂
Sent	Michael James	Investment Decisio	n	06/19/201	4 02:11 PM	6K	Account Opportunity (1) 🛛 💠
Follow Up	Jake Smith	Balanced Fund Pla	n Agreement	06/19/201	4 02:11 PM	5K	Group Licenses
All Documents	Tom Jones	Follow-Up re: Mutu	al Client Case Status	06/19/201	4 02:11 PM	6K	0 / In Progress Step: 1-Qualify
Junk							Prob: 20% Possible opportunity with client via
Trash	LinkPoint		•				need for 450 licenses.
Chat History	LINKFOINC						
Views	Priv	ate Equity Agreement	for Review				
Folders	Free	d Johnson to: Sally And	erson		06/19/201	4 02:11 PM	
Archive	History	This message has been rer	lied to		<u>ə</u>	now Details	
Tools	 1 attachment 	The measure has been rep					
Other Mail	POF						Account Opportunity Contact Opportunity
	Sample.pdf						
							Appointment
	TT C #					^	🖉 Task
	Hi Sally,					\sim	+/-
				•		nline 🔺	&



Creating a New Case in Microsoft Dynamics CRM from IBM Notes

0

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.


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.

Microsoft Dyna	amics CRM 🗸		Cases 🛛 🗸 New Case	Create	Ø ?
Sedit process					↑ ↓ JI
^{case} New Ca	ise				
Priority Normal	Follow Up By 	Status In Progress			
Identify (Active)			Research	Resolve	→ Next Stage
Summary					
CASE DETAILS			POSTS ACTIVITIES NOTES		
Case Title *			All 🚽 Add Phone Call Add Task 🚥	Contact	
ID				Tom Jones	
Subject			We didn't find any activity records.	Company Na 🔛 Example	ex Financial
Customer*	Im <u>Tom Jones</u>			Email tomjoneslp3	60@gmail.com
Service Level				📞 Mobile	
Туре				L Business 732-555-78	78
Origin					
Predicted Satisfact				RECENT CASES	
WebSite Duration					
Case Category				Status Case Title	
Upsell Referral	No			No Case records found.	

9

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.

۲		Mai	I - Inbox - IBM	Notes				- 🗆 🗙
File Edit View Create A	Actions Tools A	Window Help						
Open 👻 🛗						\mathbf{X}	- Search All	Mail Q
🔀 Sally Anderson - Mail 🛛 🛪	c							
Sally Anderson \equiv	LinkPoint - N	lew • Reply •	Reply to All 🝷	Forward •		ŵ K	3 -	Show ▼
on Local 🛛 🔛 🚺	Record To C	RM	bject				Date v	Size 🖉 🕨
Inbox	Smart Recor	d to CRM	ivate Equity Agre	ement for Review	0	6/19/2014	02:11 PM	86K 🥥 🔶
Drafts	Side Panel		estment Decisio	n	0	6/19/2014	02:11 PM	6K
Sent	Jake Sn	nith Ba	lanced Fund Pla	n Agreement	0	6/19/2014	02:11 PM	5K
Follow Up	Tom Jon	nes Fo	llow-Up re: Mutu	al Client Case Stat	tus O	6/19/2014	02:11 PM	6K
All Documents								
Junk	LinkPoint▼			• • • • • • • • • • • • • • • • • • •				
Trash								
Chat History		Private Equi	ty Agreement	for Review				
Views	- Car	Fred Johnsor	to: Sally Ande	erson			06/19/201	4 02:11 PM
Folders	History:	This mess	age has been rep	lied to.				
Archive	🔻 1 attachn	nent						
• Tools	PDF							
Other Mail	Sample.pdf							
	Hi Sally,							~
	Attached is a same of the arrayment we discussed. Diagon lating langue if you have any questions			~				
		opy of the agreen	ione we discusse	a. I lease let life k		u nave ally	quesuolis.	
					*		-••	🐴 Online -



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.

۲		Mail - Inbox - IBM Notes
File Edit View Create	Actions Tools Window	Help
Open 👻 🔛 🧮	IBM iNotes	•
Solly Anderson Mail	LinkPoint	CRM Address
Sally Anderson - Main	LinkPoint	CRM Document Library
Sally Anderson \equiv	Archive	CRM Links
on Local 🛛 🔛	Edit	CRM Send
Inbox	New	CRM Send and File
	Reply	Record to CRM
Drafts	Reply to All	Side Panel

• 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.

۲		Mail - Inbox - IBM	Notes		- 🗆 ×	🛯 LinkPoint Connect 🛛 – 🗆 🛛 🗡
File Edit View Create	Actions Tools Window	Help				🔒 2 Items 👻 🤹 Search more 🔎
Open 👻 🔛				🔀 👻 Search	All Mail 🔍 🔍	Contact
🔀 Sally Anderson - Mail	×					Fred Johnson Chief Operations Officer
Sally Anderson \equiv	LinkPoint - New - F	Reply - Reply to All -	Forward •	▶ - 📋 🖸 -	÷ Show •	Equity Management Company, LLC
on Local 🛛 🔀	🖾 🖁 Who	Subject		Date v	Size 🖉 🕨	San Francisco, CA 94117 📢 🚓
Inbox	Fred Johnson	Private Equity Agree	ement for Review	06/19/2014 02:11 PM	86K Ø ←	P: 732.555.5656 fredlp360@gmail.com
Drafts	Michael James	Investment Decision	ı	06/19/2014 02:11 PM	6K	



• 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.

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.

Record - LinkPoint Conr	nect for Microsoft CRM ×
A Contact Search: (0 items) Contact A Contact Contac	Selection Edit Follow Up Reaarding A Contact Fred Johnson Equity Management Company, LLC Refresh original items Remove All Choose Attachments to Record: Sample.pdf Check all Uncheck all
Ready	

2



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.

Percerd - LinkPoint	Connect for Microsoft CPM
Search: (0 items)	Selection Edit Fallow Un
Jake Smith	Regarding:
Contact Fred Johnson Equity Management Company, LLC Jake Smith InSite Advisors	Refersh original items Remove All Choose Attachments to Record:
L	
Ready	



•

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.

Record - LinkPoint Connect for Microsoft CRM				
Record - LinkPoint Cor Record Now Cancel Search: (0 items) Leke Smith Case Contact Contrac	Refresh original items Remove All Choose Attachments to Record: Sample.pdf			
Ready Check all Uncheck all				

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

Record - LinkPoint Co	onnect for Microsoft CRM
Record - LinkPoint Co Record Now Cancel Search: (0 items) Jake Smith Ge Regarding Contact Fed Johnson Equity Management Company, LLC Jake Smith InSite Advisors	Selection Edit Follow Up Regarding:
Ready	



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.

earch: (0 items)	Coloritor C.D. C.D.	
	Go D LT	w up
	Record To:	
	Lisa Andrews	Equity Managem 🧐
	Fred Johnson Tom Jones	Equity Managem 🤝 Examplex Financ 😒
	A Related Contact Opport	(Maximum 1 selected
	Group Lice	nses needs Andyse
	Search for Related Ite	ems Remove Al
	Choose Attachments	to Record:
	Sample.pdf	
		Check all Uncheck a



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.

Record - LinkPoint Con	nect for Microsoft CRM ×
Record - LinkPoint Con	selection Edit Follow Up Regarding:
Ready	Refresh original items Remove All Choose Attachments to Record:



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.

Record - LinkPoint Connect for Microsoft CRM ×			x	
Record Now 😢 Cancel				
Search: (0 items)	s	election	Edit Follow Up	
Financial *Financial	Go	Regarding	g;	
 Regarding Account Ocean Financial (account) Examplex Financial (account) Contact Jordao Moreno Ocean Financial Opportunity Opp: Interested in 1 / Won Opp: Interested in 0 / In Progress Opp: Interested in 0 / In Progress 	1	Refresh o Choose A	gi refning (Maximum i htact Fred Johnson Equity Management Company, LL priginal items Ref htachments to Record: ble.pdf	I selected)
			Check all Uni	check all
Ready				

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

Record - LinkPoint Con	nect for Microsoft CRM ×
Record Now Cancel Search: (0 items) Cancel Search: (0 items) Go Account Examplex Financial (account)	Selection Microsoft Critier Regarding:
	Refresh original items Remove All Choose Attachments to Record:
Ready	Check all Uncheck all



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.

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

arch: (0 items)		Colorian C.D. C.H. H.
arch. (o items)		Selection Edit Follow Up
	00	Regarding:
Regarding		Regarding (Maximum 1 selected
Contact Tam lange		Fred Johnson
Frampley Financial		Equity Management Company, LLC
A Opportunity		
Opp: Group Licens		
0 / In Progress		
Opp: Private Equit		
07 in Progress		
		Refresh original items Remove A
		Choose Attachments to Record:
		Sample.pdf



\sim

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

Record Now Scancer		
earch: (0 items)		Selection Edit Follow Up
	Go	Regarding:
Regarding		Regarding (Maximum 1 selecte
▲ Contact		▲ Contact
Tom Jones	1	Fred Johnson
Examplex Financial		Equity Management Company, LLC
 Opportunity 		
Opp: Group Licens		
0 / In Progress		
Opp: Private Equit		
0 / In Progress		
		Refresh original items Remove
		Choose Attachments to Record:
		✓ Sample.pdf
		Chack all Unchack

3

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.

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





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

g (Maximum 1 selected Johnson // lity Management Company, LLC
g (Maximum 1 selected) I Johnson // uity Management Company, LLC
Johnson Mity Management Company, LLC
Johnson 📈
iity Management Company, LLC
al items Remove Al
ments to Record:
f



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



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



CRM without affecting the email recipient's view of the content.

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.

	Enter	ОГ	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.



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.



h

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.





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.

Record - LinkPoint Con	nect for Microsoft CRM
Record Now S Cancel Search: (0 items) Go Regarding ▲ Contact Tom Jones Examplex Financial Opportunity Opp: Group Licens O / In Progress Opp: Private Equit O / In Progress	Selection Edit Follow Up About: Along with recording this email, you may also create a follow up task or appointment that will remind you act further on this email. Follow up with: Appointment v Date: 12/13/2014 15 From: 2:30 PM v To 2:45 PM v Subject: Follow up Email: Private Equity Agree Reference: Fred Johnson v Comment: Image: Subject: Subject:
	Append email body to the follow up?
Ready	

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.



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.

earch: (0 items)		Selection Edit	Follow Up
	Go	About:	•
Regarding Contact Tom Jones	<u> </u>	Along with reco a follow up tas act further on t	ording this email, you may also create k or appointment that will remind you this email.
		Follow up with:	Appointment v
Opp: Group Licens		Date:	12/13/2014
Opp: Private Equit 0 / In Progress		From:	2:30 PM × To 2:45 PM ×
,		Subject:	Follow up Email: Private Equity Agree
		Reference:	Fred Johnson v
		Comment:	
			Append email body to the follow up?

7

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

Record - LinkPoint	Conr	Selection Edit About Along with rec a follow up tas act further on 1 Follow up with: Date: From: Subject: Reference: Comment:	soft CRM Follow Up ording this email, you may also create k or appointment that will remind you this email. Appointment 12/13/2014 2:30 PM v To 2:45 PM v Follow up Email: Private Equity Agree Fred Johnson v
Ready		Comment:	Append email body to the follow up?

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

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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.

•	New Message - IBM Notes –	×
File Edit View Create Actions Te	ext Tools Window Help	
Open 🔻 🖂 🏢	🔀 🗸 Search All Mail	٩
Sally Anderson Mail y		
	in measure in the second	_
LinkPoint Send Send and File	Save as Draft Delivery Options ▶ ▼ Ø Signature ▼ Display ▼ More ▼	
CRM Address		
CRM Document Library	_	
CRM Send		
CRM Send and File	on Details	
- CRM Smart Send		
Side Panel		
Thank you for your interest in our p	products and services. A typical product demonstration takes 30 minutes and covers our product	
demonstration based on your ava	ailability. Please let me know if anyone else will be joining you for the demonstration.	
Bost		
Sally Anderson		
-		
	Body of message	_
		line 🔺



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.

Search: Fred	Go	To: cc: bcc: Remove:	Selections: jakesmithip360@gmail.com cc: bcc:
-----------------	----	-------------------------------	--

9

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.



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.

Email Address Select	To: To: Cc: bcc: Remove:	Selections: Jakesmithlp360@gmail.com cc: fredlp360@gmail.com bcc:
Ready		

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.



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.

Email Address Selecto	or - LinkPoint Con	nect for Microsoft CRM	
✓ Ok Cancel Search: Fred Go	To: CC: CC: CC: CC: CC: CC: CC: C	Selections: a To: jakesmithlp360@gmail.com a cc: fredlp360@gmail.com bcc:	
Ready			

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.

۲	New Message - IBM Notes – 🗖 💌	
File Edit View Create	Actions Text Tools Window Help	
Open 👻 🗮	🔀 🗸 Search All Mail	٩
🔀 Sally Anderson - Mail	× 🔯 New Message ×	
LinkPoint▼ Send Send	d and File Save as Draft Delivery Options 🏲 🔻 🖉 Signature 🔹 Display 🕶 More 🔻	
Hi Jake, Thank you for your inte sync and record function demonstration based of Best, Sally Anderson	jakesmithlp360@gmail.com, fredlp360@gmail.com, Demonstration Details erest in our products and services. A typical product demonstration takes 30 minutes and covers our product ionality and a brief discussion of customization capabilities. I would be more than happy to schedule a on your availability. Please let me know if anyone else will be joining you for the demonstration.	

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

ł

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.

	New Massage JBM Nates
File Falls Many County A.C. T.	the Table Medaw Hele
File Eait View Create Actions Te	xt Tools Window Help
Open - 🔀 🏢	🔀 👻 Search All Mail 🛛 🔍
🔀 Sally Anderson - Mail 🗙 🔯 Ne	w Message x
LinkPoint Send Send and File	Save as Draft Delivery Options Signature Signature More
CRM Address	
CRM Document Library	60@gmail.com,
CPM Sand	mail.com,
CRM Send and File	un Dataila
- CRM Smart Send	
Side Denel	
I hank you for your interest in our p sync and record functionality and	products and services. A typical product demonstration takes 30 minutes and covers our product a brief discussion of customization capabilities. I would be more than happy to schedule a
demonstration based on your ava	ilability. Please let me know if anyone else will be joining you for the demonstration.
Best.	
Sally Anderson	
_	
	Body of message
	🔺 🔫 🚜 Online 🔺



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

ders	Documents: (1 items)	Selected
Sample Document	Author: File Name: Sample.pdf File Size: 81,321 Created: 12/8/2014 3:07:18 PM Modified: 12/8/2014 3:07:18 PM	•
	Description:	



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

/ Ok 🛛 Cancel		
olders	Documents: (1 items)	Selected
Sample Document	Sample Author: File Name: Sample.pdf File Size: 61,321 Created: 12/8/2014 3:07:18 PM Modified: 12/8/2014 3:07:18 PM	•
	Description:	



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

k 😢 Cancel		
iers	Documents: (1 items)	Selected
Sample Document	Sample Author: File Name: Sample.pdf File Size: 81,321 Created: 12/8/2014 3:07:18 PM Modified: 12/8/2014 3:07:18 PM Description:	Sample Document Sample

4

Click **OK** to proceed.

Doc	ument Library Selector - LinkPoint Connect for Micros	soft CRM ×
V Ck Cancel Folders	Documents: (1 items) Sample Author: File Name: Sample.pdf File Size: 81,321 Created: 12/8/2014 3:07:18 PM Modified: 12/8/2014 3:07:18 PM Description:	Selected Sample Document Sample
Ready		



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.

Demonstration Details - IBM Notes
File Edit View Create Actions Text Tools Window Help
Open 👻 🗮 Search All Mail 🔍
Sally Anderson - Mail × 🔯 > Demonstration Details ×
LinkPoint 🔻 Send 🛛 Send and File Save as Draft Delivery Options 🕨 🔻 🖉 Signature 👻 Display 👻 More 🕶
To: jakesmithlp360@gmail.com,
Cc: fredlp360@gmail.com,
Bcc:
Subject: Demonstration Details
T attachment Sample.pdf
Hi Jake, Thank you for your interest in our products and services. A typical product demonstration takes 30 minutes and covers our product sync and record functionality and a brief discussion of customization capabilities. I would be more than happy to schedule a demonstration based on your availability. Please let me know if anyone else will be joining you for the demonstration. Best, Sally Anderson —
List of primary people to send message.
- 🗝 🚜 Online -



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.

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.

	Mail - Inbox - IBM Notes	- 🗆 🗙
File Edit View Creat	e Actions Tools Window Help	
Open 👻 🔛 🗐		🔀 👻 Search All Mail 🛛 🔍
🔀 Sally Anderson - Ma	il ×	
: 🕏 🍕 : 🏷 🖶	8 💐 💐 🖶 🔚 🛱 C 🛛	
Sally Ander ≡	LinkPoint • New • Reply • Reply to All • Forward • 🆿 • F • 🛱 🔳 •	More • 🗘 🔍 • Show •
on Lo 🛛 🖳	Record To CRM bject	Date Size 🖉 🕨
Inbox	Smart Record to CRM ate Equity Agreement for Review	06/19/2014 02:11 PM 86K @ 🔶
Drafts	Side Panel alanced Fund Plan Agreement	06/19/2014 02:11 PM 5K
Sent	Michael James Investment Decision	06/19/2014 02:11 PM 6K
Follow Up	Tom Jones Follow-Up re: Mutual Client Case Status	06/19/2014 02:11 PM 6K
All Documents		
Junk		

1

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.

۲	Mail - Inbox - IBM	Notes
File Edit View Create	Actions Tools Window Help	
Open 👻 🔛 📰	IBM iNotes	•
Sally Anderson Mai	LinkPoint	CRM Address
Sally Ander =	LinkPoint Archive Edit New Reply Reply to All	CRM Document Library CRM Links CRM Send CRM Send and File Record to CRM Side Panel
Drafts	Forward	Smart Record to CRM
Sent	Folder	Smart Send to CRM



• 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.

LinkPoint Connect	
Email successfully recorded.	
🔂 LinkPoint 🚥	



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.

LinkPoint Connect
The following items could not be related to any known records:
subj: Investment Decision
🔂 LinkPoint 🚥



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.

Could not Record		
Could not relate any of the selected emails to records. You must record them individually. KerkPoint		
LinkPoint Connect		
The following items could not be related to any known records:		
subj: Test subj: Investment Decision		
<mark>Ø LinkPoint</mark> ₃∞		

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.

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.

🖉 LinkPoin	t Assist - LinkPoint Connect f	or Microsoft CRM	
🖋 Ok 👒 😢 Cancel	J Apply	About	
Components	Auto Sync Sync Jobs		
🔗 LinkPoint Assist	Synchronization Settings:		
Panel Side Panel	Process: Microsoft CRM-Lotus Notes Calendar v		
Record	Synchronize Calendar records:		
💋 Sync	Behavior:		
Connectors	Synchronize Past Days: 30	~	
🛞 Lotus Notes	Synchronize Future Days: 365	5 ~	
🕌 Microsoft CRM	Synchronize Private Items:		
	Prevent Operations:		
	Microsoft CRM	Lotus Notes	
	Do not 'create' new Calendar records in Microsoft CRM	Do not 'create' new Calendar records in Lotus Notes	
	Do not 'update' existing Calendar records in Microsoft CRM	Do not 'update' existing Calendar records in Lotus Notes	
	Do not 'delete' existing Calendar records from Microsoft CRM	Do not 'delete' existing Calendar records from Lotus Notes	
Advanced Options			
Ready		Θ	



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.



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

🖉 LinkPoint Assist - LinkPoint Connect for Microsoft CRM 🛛 🗙			
🖋 Ok 👒 😢 Cancel	🥜 Apply	About	
Components	Auto Sync Jobs		
🔗 LinkPoint Assist	Synchronization Settings:		
Panel 🖉	Process: Microsoft CRM-Lotus Notes Calendar v		
Record	Synchronize Calendar records:		
🛃 Sync	Behavior:		
Connectors	Synchronize Past Days: 30	~	
🛞 Lotus Notes	Synchronize Future Days: 365	j ~	
Microsoft CRM	Synchronize Private Items:		
	Prevent Operations:		
	Microsoft CRM	Lotus Notes	
	Do not 'create' new Calendar records in Microsoft CRM	Do not 'create' new Calendar records in Lotus Notes	
	Do not 'update' existing Calendar records in Microsoft CRM	Do not 'update' existing Calendar records in Lotus Notes	
	Do not 'delete' existing Calendar records from Microsoft CRM	Do not 'delete' existing Calendar records from Lotus Notes	
Advanced Options			
Ready		•	

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.

LinkPoint Assist - LinkPoint Connect for Microsoft CRM			crosoft CRM	
🖋 Ok 👒 😢 Cancel	🥜 Apply			About
 ✓ Ok ✓ Cancel Components Ø LinkPoint Assist Ø Side Panel Ø Record Ø Sync Connectors I Lotus Notes Microsoft CRM 	Apply Auto Sync Sync Jobs Synchronization Settings: Process: Microsoft CRM-Lot Synchronize O Behavior: Synchronize Past Days: Synchronize Future Days: Synchronize Private Items: Prevent Operations: Microsoft CRM Do not 'create' new Caler records in Microsoft CRM	us Note Calendar 30 2 3 4 5 6 7	r rec	About alendar
	 Do not 'update' existing Calendar records in Micro CRM Do not 'delete' existing Calendar records from Microsoft CRM 	9 10 15 20 25 30 60		Do not 'update' existing Calendar records in Lotus Votes Do not 'delete' existing Calendar records from Lotus Notes
Advanced Options Ready		90 120 365		



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.





Connect only checks existing privacy settings and does not create privacy for individual items.

Tip: Remember, you will need to manually set any private Calendar items as Private on your calendar. LinkPoint

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

🖉 LinkPoin	t Assist - LinkPoint Connect fo	r Microsoft CRM	
🖋 Ok 👒 😢 Cancel	Apply	About	
Components	Auto Sync Jobs		
🔗 LinkPoint Assist	Synchronization Settings:		
🖉 Side Panel	Process: Microsoft CRM-Lotus Notes Calendar v		
Record	Synchronize Calendar records:		
🔂 Sync	Behavior:		
Connectors	Synchronize Past Days: 30 v		
🛞 Lotus Notes	Synchronize Future Days: 365 v		
🕌 Microsoft CRM	Synchronize Private Items:		
	Prevent Operations:		
	Microsoft CRM	Lotus Notes	
	Do not 'create' new Calendar records in Microsoft CRM	Do not 'create' new Calendar records in Lotus Notes	
	Do not 'update' existing Calendar records in Microsoft CRM	Do not 'update' existing Calendar records in Lotus Notes	
	Do not 'delete' existing Calendar records from Microsoft CRM	Do not 'delete' existing Calendar records from Lotus Notes	
Advanced Ontions			
Pandu			
Ready		V	

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.



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

	et Assist - LinkDaint Connast f	or Microsoft CDM	
	Assist - LinkPoint Connect f		
V Ok Cancel	J Apply	About	
Components	Auto Sync Sync Jobs		
🐼 LinkPoint Assist	Synchronization Settings:		
Panel Side Panel	Process: Microsoft CRM-Lotus Notes Calendar ~		
Record	Synchronize Calendar records:		
🛃 Sync	Behavior:		
Connectors	Synchronize Past Days: 30		
iii Lotus Notes	Synchronize Future Days: 365	5 ~	
Microsoft CRM	Synchronize Private Items:		
	Prevent Operations:	Lature Nation	
	Microsoft CRM	Lotus Notes	
	Do not 'create' new Calendar records in Microsoft CRM	Do not 'create' new Calendar records in Lotus Notes	
	Do not 'update' existing Calendar records in Microsoft CRM	Do not 'update' existing Calendar records in Lotus Notes	
	Do not 'delete' existing Calendar records from Microsoft CRM	Do not 'delete' existing Calendar records from Lotus Notes	
Advanced Options			
Ready		•	



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.

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.


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.

V Cancel				
Calendar Summary: (6 iten	15)			
Micr	osoft CRM		Lotus N	otes
Subject	Start Date Time	Action	Subject	Start Date Time
Sales Team Meeting	11/3/2014 4:00:00 PM	÷>		
Send Contract Details to Le	11/7/2014 8:30:00 AM			
Follow up Email: Copy of c	12/3/2014 10:30:00 AM	4 🖗		
		4 🕂	Monthly Meeting	11/4/2014 10:00:00 AM
		4 🕂	Account Review	11/7/2014 3:00:00 PM
		4 🕂	Call re: Agreement Options	11/6/2014 1:30:00 PM



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6

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.

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.

Ok 🔀 Cancel				
alendar Summary: (6 item	s)		Lotus N	otos
Subject	Start Date Time	Action	Start Date Time	
ales Team Meeting	11/3/2014 4:00:00 PM	4 >		
Send Contract Details to Le	11/7/2014 8:30:00 AM	4 Þ		
Follow up Email: Copy of co	12/3/2014 10:30:00 AM	÷>		
		⊲⇔	Monthly Meeting	11/4/2014 10:00:00 AM
		⊲⊹	Account Review	11/7/2014 3:00:00 PM
		⊲ 🖗	Call re: Agreement Options	11/6/2014 1:30:00 PM

lcon	Action
<u>ሰ</u>	New Microsoft Dynamics CRM item will be added to IBM Notes
₽	New IBM Notes item will be added to Microsoft Dynamics CRM
۵ 1	Updated Microsoft Dynamics CRM item will be updated in IBM Notes
4 2	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



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.

🔗 Synch	ronizatio	on Summary - LinkPo	oint Cor	nnect for Microsoft (CRM – 🗆 🗙	
🗸 Ok 🛛 😢 Cano	cel					
Calendar Summa	ary: (6 item Micro	s) soft CRM		Lotus	Notes	
Subject		Start Date Time	Action	Subject	Start Date Time	
Sales Team Meet	ting	11/3/2014 4:00:00 PM	46			
Send Contract De	etails to Le	11/7/2014 8:30:00 AM	- ⊕ ⊳			
Follow up Email:	Copy of co	12/3/2014 10:30:00 AM	44 44 44 44	Gopy the Copy the Gopy the Gopy the Gopy the Gopy the Gop the	ne 'Microsoft CRM' version differences until the next t difference forever	to 'Lotus Notes' ime one changes
Ready			S	ync will copy the Microsoft	CRM version to Lotus Notes	

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.

Synchronizatio	on Summary - LinkPo	oint Cor	nnect for Microsoft C	RM – 🗆 🗙	
🖉 Ok 🙁 Cancel					
Calendar Summary: (6 item:	5)				
Micro	soft CRM		Lotus M	lotes	
Subject	Start Date Time	Action	Subject	Start Date Time	
Sales Team Meeting	11/3/2014 4:00:00 PM	÷ 🖓			
Send Contract Details to Le	11/7/2014 8:30:00 AM				
Follow up Email: Copy of cc	12/3/2014 10:30:00 AM	- 🔶 🔛			
		4 🐈	Monthly Meeting	11/4/2014 10:00:00 AM	
		4 🖶	Account Review	11/7/2014 3:00:00 PM	
		4 🕂	Call re: Agreement Options	11/6/2014 1:30:00 PM	
			right dia kan a second	e 'Lotus Notes' version to 'M	icrosoft CRM'
Ready		S	🛭 🖞 Ignore d	ifferences until the next time	one changes
			🖸 💎 🕅 Ignore d	ifference forever	_

8

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

/ Ok 😮 Cancel				
Calendar Summary: (6 item:	5)			
Micro	soft CRM		Lotus N	otes
Subject	Start Date Time	Action	Subject	Start Date Time
Sales Team Meeting	11/3/2014 4:00:00 PM			
Send Contract Details to Le	11/7/2014 8:30:00 AM	- 🕂 🔛		
Follow up Email: Copy of cc	12/3/2014 10:30:00 AM	- 🔶 🍉		
		4 🕂	Monthly Meeting	11/4/2014 10:00:00 AM
		4 🕂	Account Review	11/7/2014 3:00:00 PM
		4 🕂	Call re: Agreement Options	11/6/2014 1:30:00 PM



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**.

۲	Contacts - M	y Contacts - IBM No	otes		- 🗆 🗙
File Edit View Create Actions To	ols Window Help				
Open 👻 🧮				👤 🔸 Search All (Contacts Q
🔀 Sally Anderson - Mail 🗙 👤 Sal	y Anderson - Contacts 🛛 🗙				
Sally Anderson \equiv New	- Edit Forward vCard	Browse for Co	ontact 🖆 🔯	More • Q •	Show -
on Local 😭	Name	E-mail	Р	hone	
My Contacts All	Johnson, Fred	"Fred Johnso	on" <fredlp360@gmail.< th=""><th></th><th>^</th></fredlp360@gmail.<>		^
Recent Contacts A-B		com>	Johnson, Fred	<u>ا ا</u>	
Groups	Jones, Tom	"Tom Joi <tomjon< th=""><th>Edit</th><th>Ctrl+E</th><th></th></tomjon<>	Edit	Ctrl+E	
By Category G-H	Smith, Jake	"Jake Sr 🖺	Mark as	+	
By Company I-J	1	<jakesm< th=""><th>Send a Message</th><th></th><th>× </th></jakesm<>	Send a Message		×
Birthdays & Anniversaries K-L	`	1	Schedule a Meeting		
M-N Trash	Fred Johnson	品	Categorize		<u> </u>
O-P	"Fred Johnson" <fredlp:< th=""><th>360@gmail.com> 🐴</th><th>Forward vCard</th><th></th><th></th></fredlp:<>	360@gmail.com> 🐴	Forward vCard		
Q-R			Copy Into New Group		
Advanced S-T	E-mail		Open in New Window		
U-V	Business:	"Fred Johnson"	Print	Ctrl+P	
W-X	Other Information		D.L.		
Y-Z	Messaging ID:	Fred Johnson <f< th=""><th>Delete</th><th>Del</th><th></th></f<>	Delete	Del	

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.

Categorize	? ×
Select categories for docum	ent(s)
CRM	
Add esterony	Add
	744
	OK Cancel



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.



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.

🥖 Ok 🛛 🕄 Ca	ncel					
Contact Summ	ary: (6 items) Microsoft (RM			Lotus Notes	
Last Name	First Name	Email Address	Action	Last Name	First Name	Email Address
Jones	Tom	tomjoneslp360@	- 🕂 ⊳			
Smith	Jake	jakesmithlp360@	- 🔶 ⊳			
Johnson	Fred	fredlp360@gmail	- 🔶 🗭			
			⊲ 🕂	Ripley	Tom	tripleylp360@gm
			⊲ 🐈	Andrews	Lisa	lisaandrewslp360
			4 🖗	White	Brandon	brandonwhitelp3



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.

ynchronization S	ummary - LinkPo	int Cor	nnect for Mi	crosoft CRM	- 🗆 🗙
Cancel					
mmary: (6 items) Microsoft	CRM			Lotus Notes	
First Name	Email Address	Action	Last Name	First Name	Email Address
Tom	tomjoneslp360@				
Jake	jakesmithlp360@	4 Þ			
Fred	fredlp360@gmail	÷>			
		⊲₽	Ripley	Tom	tripleylp360@gm
		4₽	Andrews	Lisa	lisaandrewslp360
		⊴ 🖗	White	Brandon	brandonwhitelp3
	ynchronization Si Cancel mmary: (6 items) Kicrosoft : First Name Tom Jake Fred	vnchronization Summary - LinkPo Cancel mmary: (6 items) Microsoft CRM : First Name Email Address Tom tomjoneslp360@ Jake jakesmithlp350@ Fred fredlp360@gmail	vnchronization Summary - LinkPoint Cor Cancel mmary: (6 items) Microsoft CRM : First Name Email Address Action Tom tomjoneslp360@ ⊕ Jake jakesmithlp360@ ⊕ Fred fredlp360@gmail ⊕ G ⊕	ynchronization Summary - LinkPoint Connect for Mi Cancel mmary: (6 items) First Name Email Address Action Last Name Tom tomjoneslp360@ ↔ Jake jakesmithlp360@ ↔ Fred fredlp360@gmail ↔ Fred Andrews	vnchronization Summary - LinkPoint Connect for Microsoft CRM Cancel mmary: (6 items)

lcon	Action
4	New Microsoft Dynamics CRM contact will be added to IBM Notes
₽	New IBM Notes contact will be added to Microsoft Dynamics CRM
۵ 10	Updated Microsoft Dynamics CRM contact will be updated in IBM Notes
4	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**.

	🧭 Synchronization Summary - LinkPoint Connect for Microsoft CRM – 🗆 🗙								
	V Ok 🔇 Cancel								
	Contact Summa	ary: (6 items)							
	Microsoft CRM				Lotus Notes				
	Last Name	First Name	Email Address	Action	Last Name	First Name	Email Address		
	Jones	Tom	tomjoneslp360@	46					
	Smith	Jake	jakesmithlp360@	- ∲ ⊳					
🖓 🗭 Copy t	the 'Microsoft CR	M' version to 'Lot	us Notes'	44					
	differences until	the next time on	- changes	4 🖶	Ripley	Tom	tripleylp360@gm		
i i v ignore	e unierences unui	the next time on	e changes	⊲ 🖗	Andrews	Lisa	lisaandrewslp360		
I 🔿 🦻 Ignore	e difference foreve	er		4 🖗	White	Brandon	brandonwhitelp3		
	Ready Sync will copy the Microsoft CRM version to Lotus Notes								

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.

	V Ok 😢 Car	✓ Ok S Cancel						
	Contact Summa							
		Microsoft (RM			Lotus Notes		
	Last Name	First Name	Email Address	Action	Last Name	First Name	Email Address	
	Jones	Tom	tomjoneslp360@					
	Smith	Jake	jakesmithlp360@	÷>				
	Johnson	Fred	fredlp360@gmail	- 🖞 🔛				
				4 🕆	Ripley	Tom	tripleylp360@gm	
				4 🕂	Andrews	Lisa	lisaandrewslp360	
4 🕂	Copy the 'Lotu	s Notes' version t	o 'Microsoft CRM'		White	Brandon	brandonwhitelp3	
1	lgnore differen	ices until the next	time one changes		nc will copy th	e Lotus Notes versio	n to Microsoft CRM	



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

🖉 Ok 🛛 🖸 Ca	ncel					
Contact 💼 (C	trl) = ⁶ items) Microsoft (CRM			Lotus Notes	
Last Name	First Name	Email Address	Action	Last Name	First Name	Email Address
Jones	Tom	tomjoneslp360@	÷>			
Smith	Jake	jakesmithlp360@	- 🕂 ⊳			
Johnson	Fred	fredlp360@gmail	- 🖗 ⊳			
			4 🐈	Ripley	Tom	tripleylp360@gn
			4 🐈	Andrews	Lisa	lisaandrewslp360
			4 🖗	White	Brandon	brandonwhitelp3



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

0

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.



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.

· · · •				
Task Summary: (4 items) Mi	crosoft CRM		Lotu	s Notes
Subject	Due Date	Action	Subject	Due Date
Follow Up Call 1	11/11/2014 12:00:00 AM	÷>		
Reach Out	11/13/2014 12:00:00 AM			
Review Lead Status	11/12/2014 12:00:00 AM			
		4 🕂	Review Team Quotas	11/11/2014 12:00:00 AN



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.



lcon	Action
<u>ሰ</u>	New Microsoft Dynamics CRM task will be added to IBM Notes
\$	New IBM Notes task will be added to Microsoft Dynamics CRM
۵ 82	Updated Microsoft Dynamics CRM task will be updated in IBM Notes
₹ <u>2</u>	Updated IBM Notes task will be updated in Microsoft Dynamics CRM
*	Deleted Microsoft Dynamics CRM task will be removed from IBM Notes
3 ≵ ⊽	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**.

	Synchronization Summary - LinkPo			nnect for Microsoft	CRM – 🗆 🗙
	🛷 Ok 😵 Cancel				
	- Task Summary: (4 items) Microsoft CRM		Lotus Notes		
	Subject	Due Date	Action	Subject	Due Date
	Follow Up Call 1	11/11/2014 12:00:00 AM	- ⊕ ⊳		
Copy the	Copy the 'Microsoft CRM' version to 'Lotus Notes'				
Image: Second			40	Review Team Quotas	11/11/2014 12:00:00 AM
	Ready		s	ync will copy the Microsof	t CRM version to Lotus Notes



•

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.

[Synchroniza	tion Summary - LinkPo	int Cor	nnect for Microsoft	CRM – 🗆 🗙		
	√ Ok 🙁 Cancel						
	Task Summary: (4 items)						
	Microsoft CRM			Lotus Notes			
	Subject	Due Date	Action	Subject	Due Date		
	Follow Up Call 1	11/11/2014 12:00:00 AM	÷>				
	Reach Out	11/13/2014 12:00:00 AM					
	Review Lead Status	11/12/2014 12:00:00 AM	_ ₽ ⊳				
🕂 🗭 Copy ti	ne 'Microsoft CRM' versio	n to 'Lotus Notes'	4 🕂	Review Team Quotas	11/11/2014 12:00:00 AM		
1 👽 Ignore	differences until the next	time one changes					
◯◯ 🕅 Ignore	difference forever	-	S	ync will copy the Microsof	t CRM version to Lotus Notes		

8

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

Ok 🖸 🖸 Cancel				
Task Summary: (4 items M) icrosoft CRM		Lotu	s Notes
Subject	Due Date	Action	Subject	Due Date
Follow Up Call 1	11/11/2014 12:00:00 AM	÷>		
Reach Out	11/13/2014 12:00:00 AM			
Review Lead Status	11/12/2014 12:00:00 AM	- 🕂 🔛		
		4 🕂	Review Team Quotas	11/11/2014 12:00:00 AM

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.



1

Н

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.

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





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

🖉 LinkPoin	t Assist - LinkPoint Connect for Microsoft CRM
🖋 Ok 👒 😢 Cancel	Apply About
Components Components Components Connectors Connectors Connectors Connectors Microsoft CRM	Auto Sync Sync Jobs Auto Sync Fornization: Auto Synchronization: Automatically run synchronization every: Never Only run synchronization between: 9:00 AM - 5:00 PM During an auto synchronization, when should the summary form appear for your review? Never (just apply the changes without my review) Always (I want to review all changes) Only when New records are being created Evistion records are being undated
Advanced Options	 Existing records are being deleted More than 5 vitems are to be affected Show messages when: Auto-sync starts Auto-sync fails Other: O not 'update' fields that may have formatting, images or attachments. (i.e. body field of appointments or contact notes)
Ready	Θ

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.

🖉 LinkPoin	t Assist - LinkPoint Connect for Micro	osoft CRM	×
🗹 Ok 👒 😢 Cancel	Apply		About
Components 🔗 LinkPoint Assist	Auto Sync Sync Jobs Auto Synchronization:		
Panel 🖉	Automatically run synchronization every:	Never	~
Record	Only run synchronization between: 9:00 AM	Never	
💋 Sync		1 hour 2 hours	
Connectors	During an auto synchronization, when shou appear for your review? Never (just apply the changes without r Always (I want to review all changes) Only when New records are being created Existing records are being updated Existing records are being deleted	3 hours 4 hours 5 hours 6 hours 7 hours 8 hours 9 hours	n
	 More than 5 items are to be a Show messages when: ✓ Auto-sync starts ✓ Auto-sync fails Other: ✓ Do not 'update' fields that may have fir attachments. (i.e. body field of appoint) 	10 hours 11 hours 12 hours 13 hours 14 hours 15 hours 16 hours	r ptes)
Advanced Options		1/ hours	\checkmark
Ready			Ø



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.

🕫 LinkPoir	at Assist - LinkPoint Connect for Microsoft CRM
🖋 Ok 👒 😢 Cancel	Apply About
Components Components LinkPoint Assist Side Panel Sync Connectors Lotus Notes Microsoft CRM	Auto Sync Sync Jobs Auto Sync Synchronization: Automatically run synchronization every: Never Only run synchronization between: 9:00 AM - 5:00 PM During an auto synchronization, when should the summary form appear for your review? Never (just apply the changes without my review) Always (I want to review all changes) Only when New records are being created Existing records are being updated Existing records are being deleted More than 5 items are to be affected Show messages when: Auto-sync fails Other: Do not 'update' fields that may have formatting, images or attachments. (i.e. body field of appointments or contact notes)
Ready	۷

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.



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



LinkPoir	t Assist - LinkPoint Connect for Microsoft CRM
🖋 Ok 👒 😢 Cancel	Apply About
Components Side Panel Record Sync Connectors Microsoft CRM	Auto Sync Sync Jobs Auto Synchronization: Automatically run synchronization every: Never Only run synchronization between: 9:00 AM - 5:00 PM During an auto synchronization, when should the summary form appear for your review? Never (just apply the changes without my review) Always (I want to review all changes) Only when New records are being created Existing records are being updated Existing records are being deleted More than 5 vitems are to be affected Show mescanes when:
Advanced Options Ready	 ✓ Auto-sync starts ✓ Auto-sync fails Other: ✓ Do not 'update' fields that may have formatting, images or attachments. (i.e. body field of appointments or contact notes)

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.

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

🕫 LinkPoir	nt Assist - LinkPoint Connect for Microsoft CRM
🖋 Ok 👒 😢 Cancel	Apply About
Components Components Components Components Connectors Connectors Connectors Microsoft CRM	Auto Sync Sync Jobs Auto Sync Synchronization: Automatically run synchronization every: Never Only run synchronization between: 9:00 AM - 5:00 PM During an auto synchronization, when should the summary form appear for your review? Never (just apply the changes without my review) Always (I want to review all changes) Only when New records are being created Existing records are being updated Existing records are being deleted More than 5 vitems are to be affected
Advanced Options	Show messages when: ✓ Auto-sync starts ✓ Auto-sync fails Other: ✓ Do not 'update' fields that may have formatting, images or attachments. (i.e. body field of appointments or contact notes)
Ready	0



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.

🕫 LinkPoin	t Assist - LinkPoint Connect for Microsoft CRM
🖋 Ok 👒 😢 Cancel	
Components Side Panel Record Sync Connectors Connectors Microsoft CRM	Auto Sync Sync Jobs Auto Synchronization: Automatically run synchronization every: Never Only run synchronization between: 9:00 AM - 5:00 PM During an auto synchronization, when should the summary form appear for your review? Never (just apply the changes without my review) Always (I want to review all changes) Only when New records are being created Existing records are being updated Existing records are being deleted More than 5 vitems are to be affected Show messages when: Auto-sync fails Other: Do not 'update' fields that may have formatting, images or attachments, (i.e. body field of appointments or contact notes)
Advanced Options Ready	۹

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.



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.

🖉 LinkPoir	nt Assist - LinkPoint Connect fo	or Microsoft CRM
✔ Ok 👒 😢 Cancel	Apply	About
 ✓ Ok ✓ Cancel Components Ø LinkPoint Assist ⁽²⁾ Side Panel ₍₂₎ Record <u>(2)</u> Sync Connectors (1) Lotus Notes (1) Microsoft CRM 	Apply Apply Auto Sync Sync Jobs Synchronization Settings: Process: Microsoft CRM-Lotus No	About terrecords: Lotus Notes Lotus Notes Lotus Notes Calendar records in Lotus Notes Do not 'update' existing Calendar records in Lotus Notes Do not 'delete' existing Calendar records from Lotus Notes
Advanced Options		
Ready		0

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 **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.

A

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.





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

🕫 LinkPoin	t Assist - LinkPoint Connect for Microsoft CRM
🗹 Ok 👒 😢 Cancel	Apply About
Components Components Converting Record Sync Connectors Connectors Connectors Microsoft CRM	Auto Sync Sync Jobs Auto Synchronization: Automatically run synchronization every: Never Only run synchronization between: 9:00 AM - 5:00 PM During an auto synchronization, when should the summary form appear for your review? Never (just apply the changes without my review) Always (I want to review all changes) Only when New records are being created Existing records are being updated Existing records are being deleted More than 5 items are to be affected Show messages when: Auto-sync fails Other: Do not 'update' fields that may have formatting, images or attachments. (i.e. body field of appointments or contact notes)
Ready	۷

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.

🖉 LinkPoin	t Assist - LinkPoint Connect for Micro	osoft CRM	×
🗹 Ok 👒 😢 Cancel	Apply		About
Components	Auto Sync Sync Jobs Auto Synchronization: Automatically run synchronization every:	Never	v
Record	Only run synchronization between: 9:00 Al	Never 1 hour	
Sync Connectors iii) Lotus Notes	During an auto synchronization, when shou appear for your review? Never (just apply the changes without r Always (I want to review all changes) Only when New records are being created Existing records are being updated Existing records are being deleted More than 5 items are to be a Show messages when: Auto-sync starts Auto-sync fails Other: Do not 'update' fields that may have for attachments. (i.e. body field of appoint	2 hours 2 hours 3 hours 4 hours 5 hours 6 hours 7 hours 8 hours 9 hours 10 hours 11 hours 12 hours 13 hours 14 hours 15 hours 16 hours 17 hours 10 hours 10 hours 10 hours 11 hours 12 hours 13 hours 14 hours 13 hours 14 hours 15 hours 14 hours 15 hours 16 hours 17 hours 10 hours 10 hours 10 hours 10 hours 11 hours 12 hours 13 hours 13 hours 14 hours 14 hours 13 hours 14 hours 15 hours 16 hours 17 hours 10 hours 10 hours 10 hours 10 hours 11 hours 12 hours 13 hours 14 hours 15 hours 16 hours 17 hours 17 hours 17 hours 17 hours 18 hours 19 hours 10 ho	n r otes)
Advanced Options		17 hours	×
Ready			0



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

🖉 LinkPoir	at Assist - LinkPoint Connect for Microsoft CRM
🗹 Ok 👻 🕄 Cancel	Apply About
Components	Auto Sync Sync Jobs Auto Syncronization: Automatically run synchronization every: Never Only run synchronization between: 9:00 AM - 5:00 PM During an auto synchronization, when should the summary form appear for your review? Never (just apply the changes without my review) Always (I want to review all changes) Only when New records are being created Existing records are being updated Existing records are being deleted More than 5 items are to be affected Show messages when: Auto-sync starts Auto-sync fails Other: Do not 'update' fields that may have formatting, images or attachments. (i.e. body field of appointments or contact notes)
Advanced Options	
Ready	•

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

6

5

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





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





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

0

1

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.

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.





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.



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.

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Components	User/License Web Proxy Updates Start Up & Support
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(iii) Lotus Notes	Override Proxy Server
	Port: 80 Test Connection
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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.





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.

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	File LinkPointAssist.exe LinkPointComInterface.d LinkPointCommon.dll LinkPointCoare.dll LinkPointCoare.dll LinkPointCoagle.dll LinkPointHost.dll LinkPointLicenseManage LinkPointLicens	Installed Version 5.5.5438.27496 5.0.05 5.5.5438.27486 5.5.5438.27452 5.5.5438.27452 5.5.5438.27452 5.5.5438.27459 5.5.5438.27479 5.5.5438.27479 5.5.5438.27479 5.5.5438.27479 5.5.5438.27479 5.5.5438.27479 5.5.5438.27479 5.5.5438.27479 5.5.5438.27479 5.5.5438.27479 5.5.5438.27479 5.5.5438.2748 5.5.5438.2749 5.5.543	Latest Version 5.5.5438.27496 5.0.03 5.5.5438.27488 5.5.5438.27452 5.5.5438.27452 5.5.5438.27452 5.5.5438.27452 5.5.5438.27459 5.5.5438.27457 5.5.5438.27457 5.5.5438.27457 5.5.5438.27457	<
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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.





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.

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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.

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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.

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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.

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

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



2

1

Ø LinkPoint Assist - LinkPoint Connect for Microsoft CRM 🖋 Ok 👒 😢 Cancel 🕜 Apply About Appearance Components v Color Theme: Auto 🖉 LinkPoint Assist & Side Panel lanore: Ignore the following items when looking up details: Record 🔁 Sync Connectors Hotus Notes 🕌 Microsoft CRM One entry per line. For example: "john@xyz.com' "@xyz.com" Pop-Up Detail Window When I double-click an item to view it's details... Auto-Close the resulting window when I click off it. O Wait until I press the 'Esc' key or click the X button. Reset window location to screen center Advanced Options Ready 0



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.





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.

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



2

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

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& Side Panel	But ignore files con	taining these words (1 word per line):		
Record				
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🕌 Microsoft CRM	✓ Indicate success/failu	re message after recording?		
	Immediately open the recorded item after its created?			
	Automatically expand related items?			
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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.

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	Assist - LinkPoint Connect for Microsoft CRM	
V Ok 🔹 😢 Cancel		About
Components Components Component Assist Connectors Connectors Microsoft CRM	Options Record Options: By default include all attachments when recording. But ignore files containing these words (1 word per line): Immediately open the recorded item after its created? Automatically expand related items? Default Follow Up With: Nothing Default Follow Up With: Sefult Follow Up With: Append email body to the follow up Ending Mee: Sefult Soloreate a follow up in your Email System:	v ng. 2?
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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.



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

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✓ Ok ✓ Cancel Components ✓ LinkPoint Assist ✓ Side Panel ✓ Side Panel ✓ Sync ✓ Connectors ✓ Lotus Notes ✓ Microsoft CRM	 ✓ Apply ✓ Options Record Options: By default include all attachments when recording. But ignore files containing these words (1 word per line): ✓ Indicate success/failure message after recording? Immediately open the recorded item after its created? ✓ Automatically expand related items? Default Follow Up With: Nothing Default Date: 5 ✓ Calendar Days ✓ after recordir Default Subject: Follow up Email: Append email body to the follow up Remind Me: 15 minutes ✓ before 	v ng.
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5

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

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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.

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Components Calify LinkPoint Assist Components Side Panel Connectors Connectors Lotus Notes Microsoft CRM	Options Record Options: By default include all attachments when recording. But ignore files containing these words (1 word per line): Indicate success/failure message after recording? Immediately open the recorded item after its created? Automatically expand related items? Default Follow Up With: Nothing Default Date: 5 ∨ Calendar Days ∨ after record Default Subject: Follow up Email: Append email body to the follow up Email: Asso create a follow up 15 minutes ∨ before Also create a follow up in your Email System:	v jup?
Advanced Options Ready		•



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.



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

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Working with LinkPoint Connect Contextual Help

Finding Knowledge Base Articles within LinkPoint Connect

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LinkPoint360 offers comprehensive knowledge base articles and help documentation online at <u>www.linkpoint360.com/kb</u>. 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.



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**.

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Sync Connectors	Email Address	sally_ander	sonlp360@	Dgmail.com	
Hotus Notes	License Key:	mylicensek	ey		
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Help Mode enabled. Clie	ck an item to find	more inforr	mation.		•



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

