LinkPoint Connect User Guide

IBM Notes & Salesforce 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.

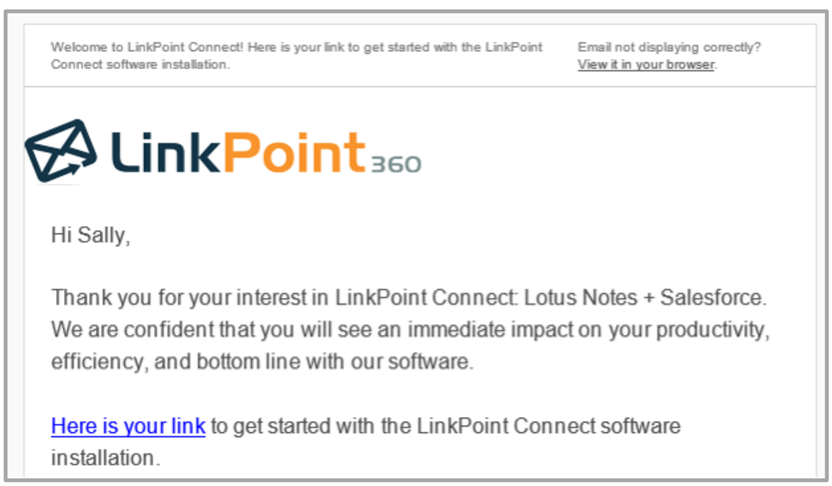
Installing LinkPoint Connect

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 Salesforce AppExchange, 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 + Salesforce software. For users in Terminal Services or Citrix environments, please refer to additional documentation.

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



Welcome to LinkPoint Connect! Here is your link to get started with the LinkPoint Connect software installation.

Email not displaying correctly?
View it in your browser.

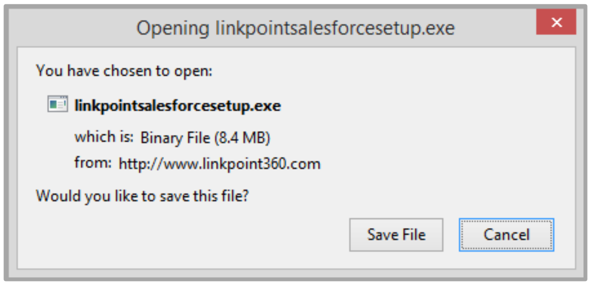
LinkPoint360

Hi Sally,

Thank you for your interest in LinkPoint Connect: Lotus Notes + Salesforce. We are confident that you will see an immediate impact on your productivity, efficiency, and bottom line with our software.

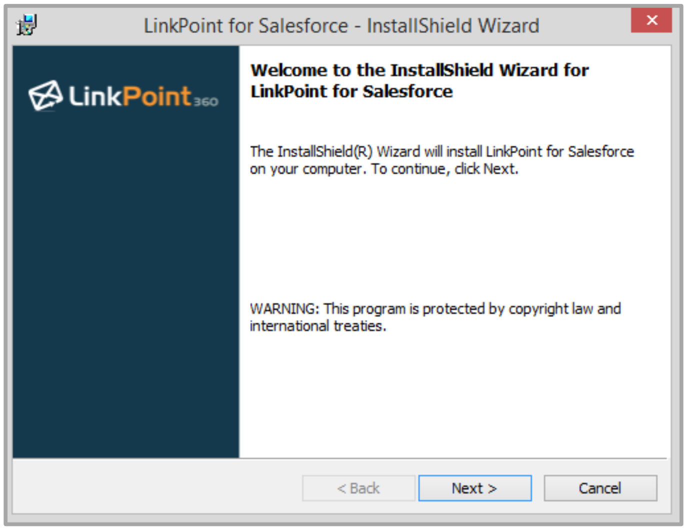
Here is your link to get started with the LinkPoint Connect software installation.

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

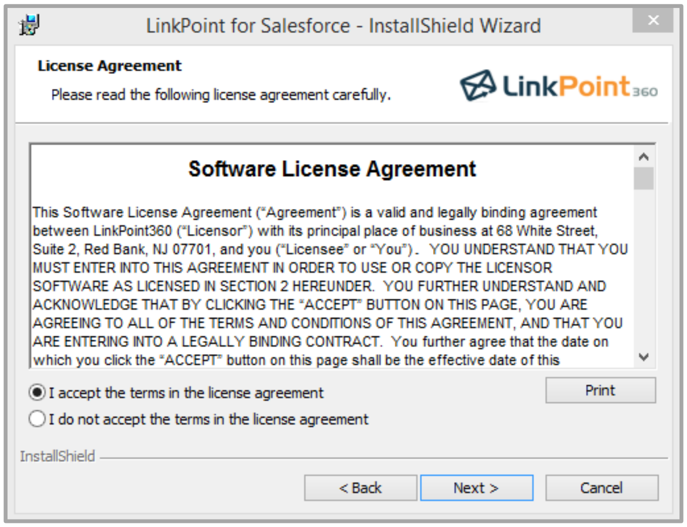


3 Locate the file **LinkPointSalesforceSetup.exe** on your computer and double click the file to launch the installer.

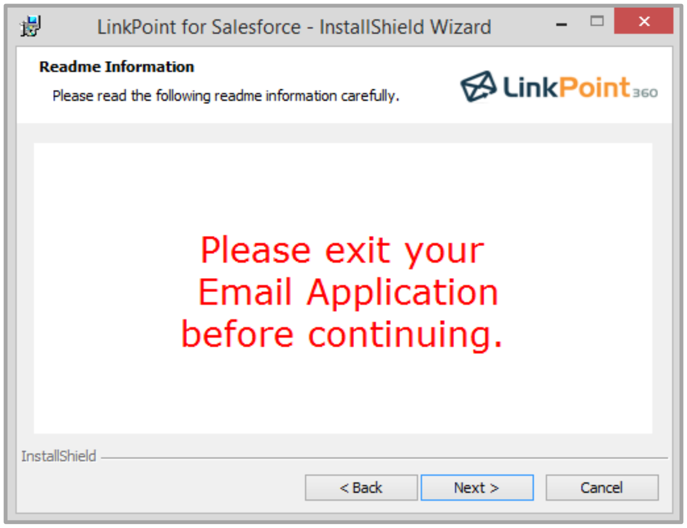
4 Click **Next** on the first screen within the **LinkPoint for Salesforce – InstallShield Wizard** to start the installation process.



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

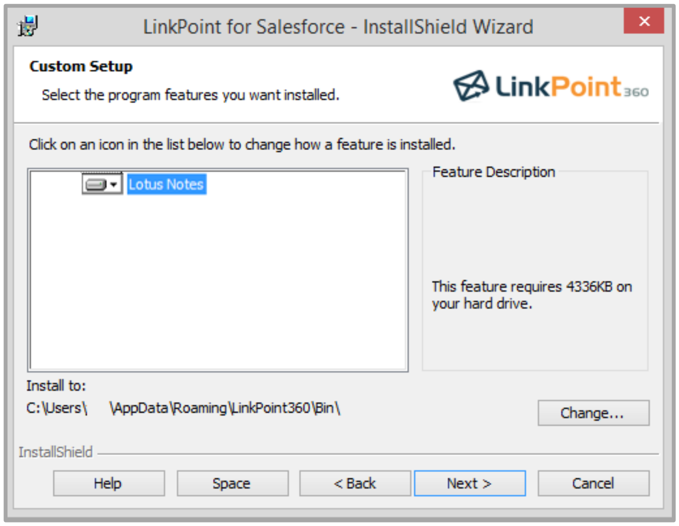


6 Close IBM Notes if you have not done so already. Be sure to close the email application before clicking the **Next** button in the Installer to continue.



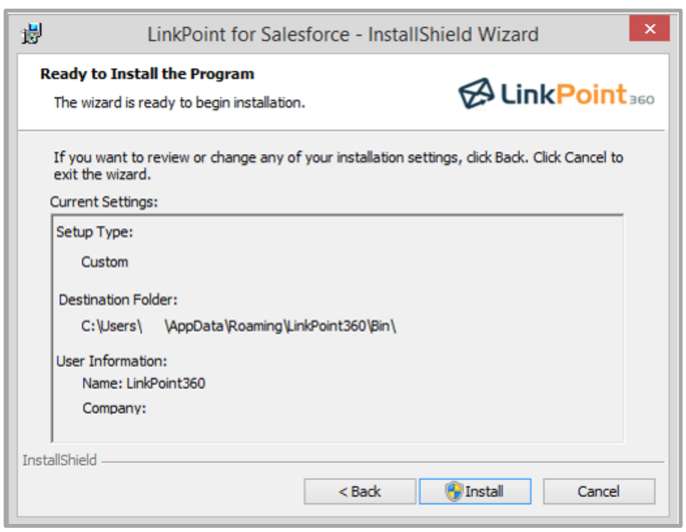
7

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



8

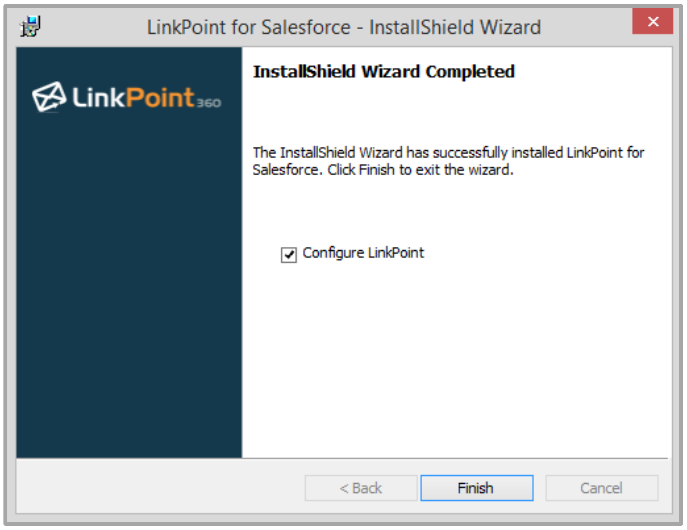
Review the **Current Settings** for the installation. Click the **Back** button to make changes, or click the **Install** button to start the installation.



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

9

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

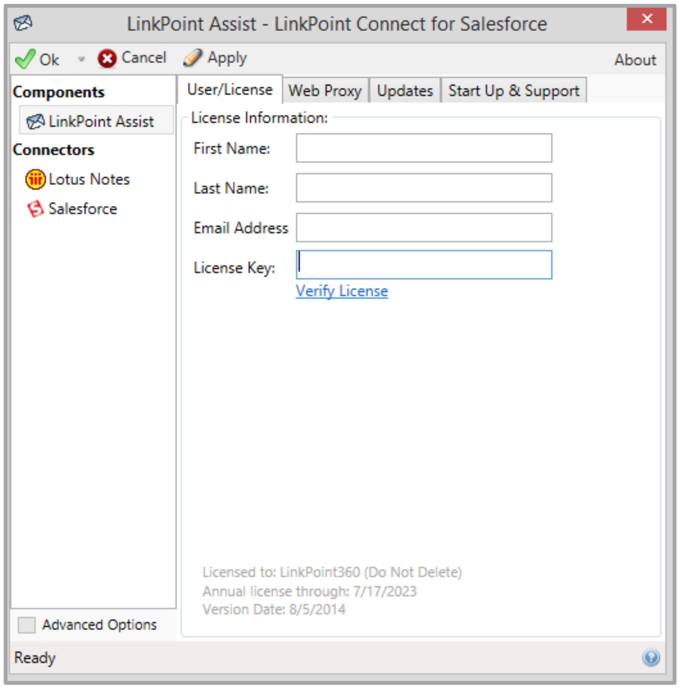


Tip: If you are not ready to configure LinkPoint Connect, you can uncheck the **Configure LinkPoint** box and click **Finish**. Follow the steps for Entering a License Key in the next section of this User Guide when you are ready to proceed.

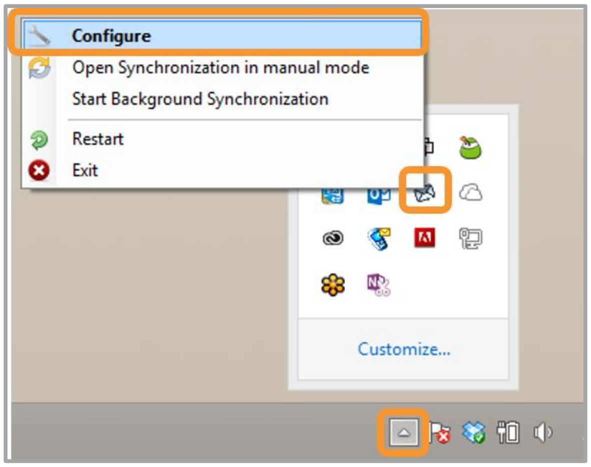
Entering a License Key

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

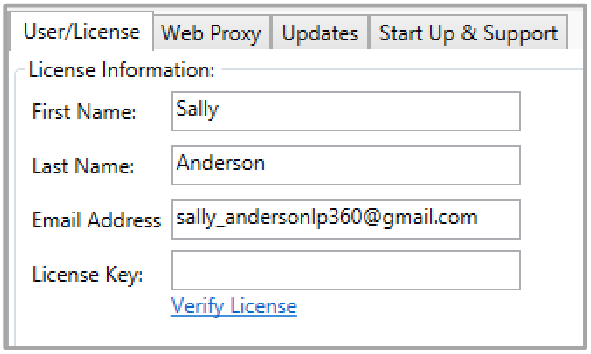
1 Launch the **LinkPoint Assist** window.



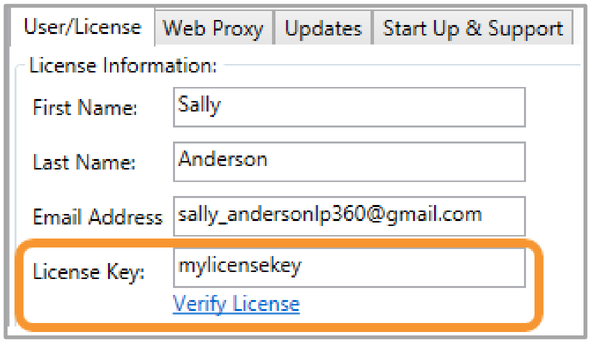
Tip: You may automatically arrive within LinkPoint Assist by checking the option to **Configure LinkPoint** when finishing the installer. You can also access these settings by right clicking the **LinkPoint Assist** icon in the system tray near your desktop clock and then selecting **Configure**.



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



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



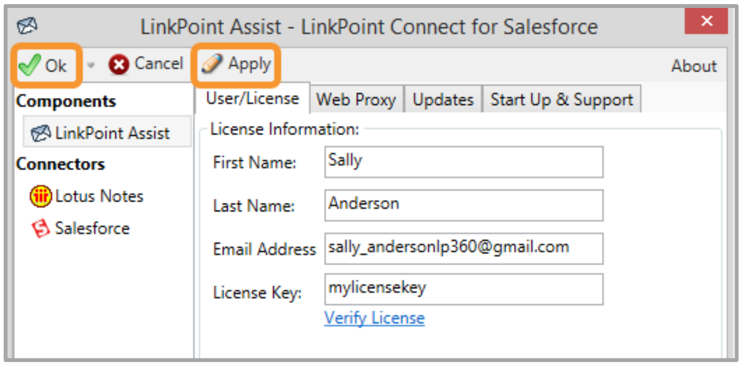
Tip: If you are installing LinkPoint Connect as part of the free trial, the License Key will be **Evaluation**. This field may already be populated for you.

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

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

4

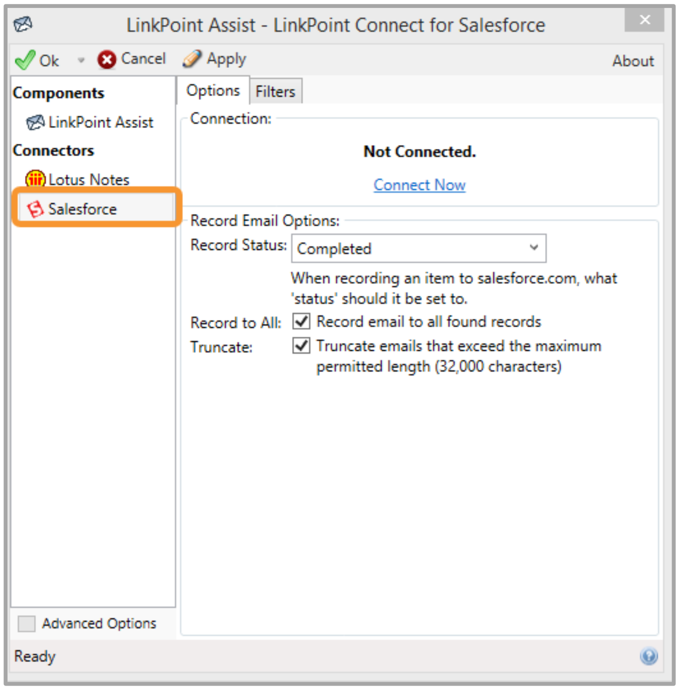
Click **Apply** and then click **Ok** to save the changes.



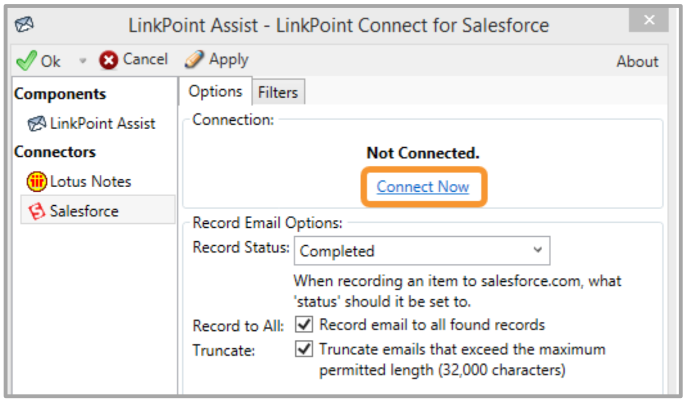
Connecting LinkPoint Connect to Salesforce

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

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

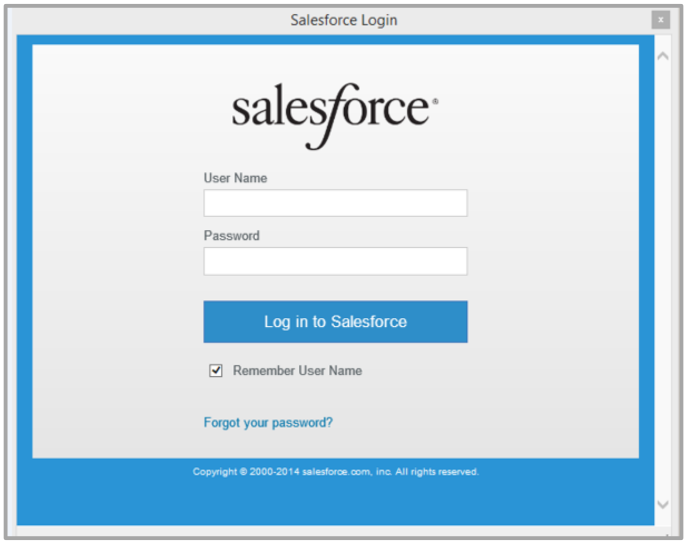


2 Select **Connect Now** within the Connection window to configure LinkPoint Connect for Salesforce.



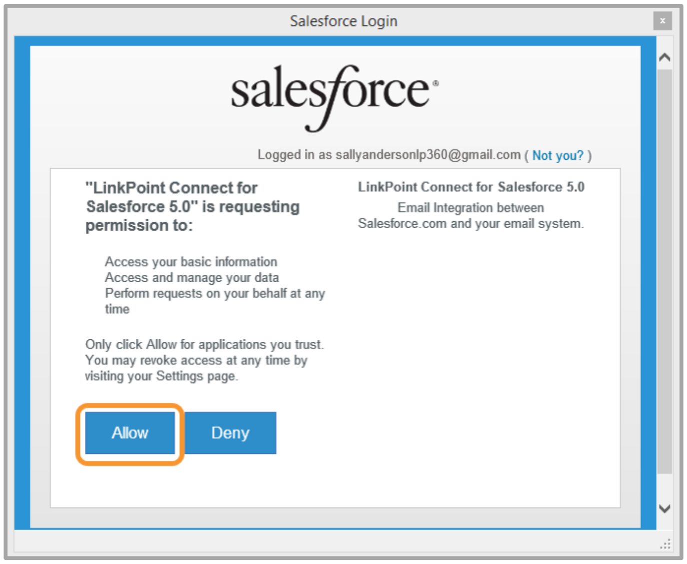
3

Enter your Salesforce **User Name** and **Password**, and click the **Log in to Salesforce** button.



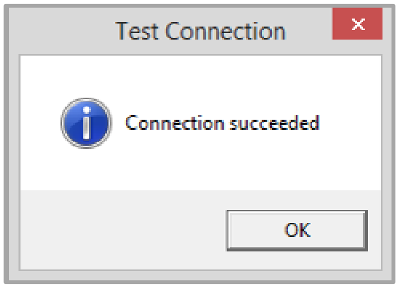
4

Click **Allow** to enable LinkPoint Connect to access your Salesforce account and display your Salesforce information in IBM Notes.



5

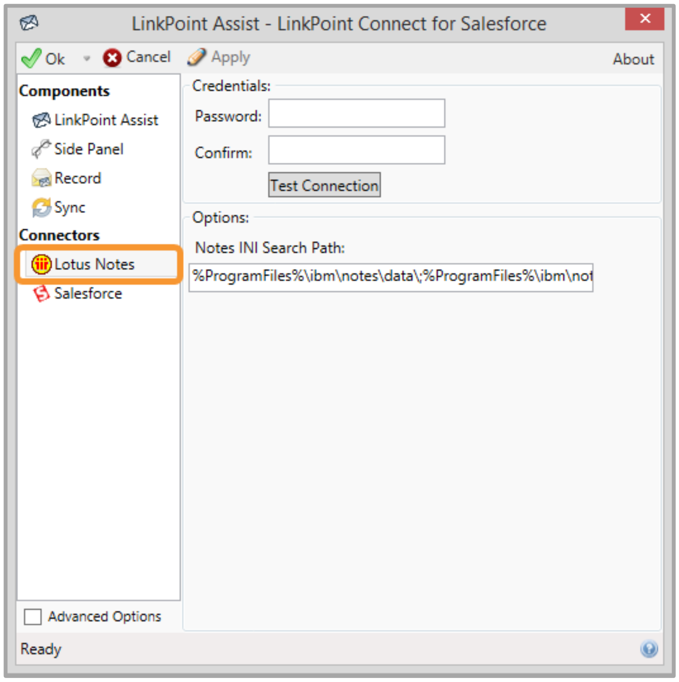
LinkPoint Connect will test the connection to Salesforce. This may take a few moments. Click OK once the Test Connection window displays the Connection succeeded message.



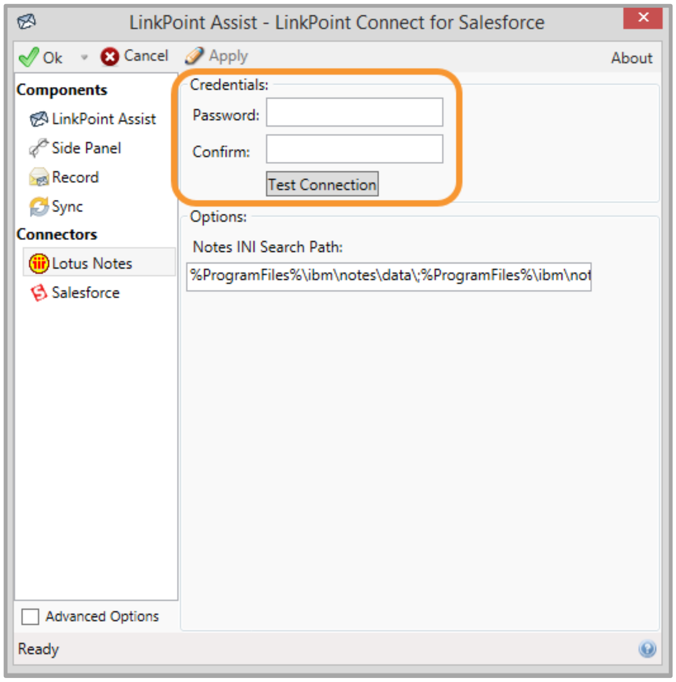
Connecting IBM Notes and LinkPoint Connect

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

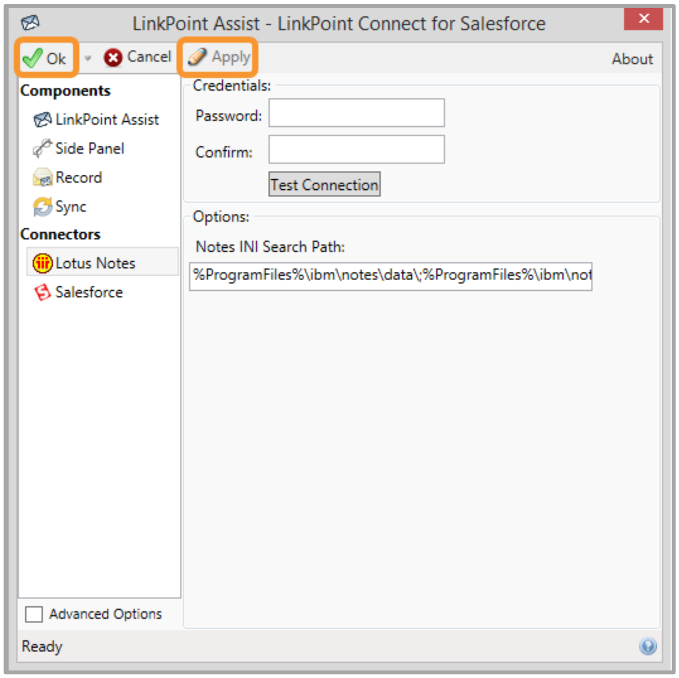
1 Launch the **LinkPoint Assist** window, and select **IBM Notes** from the left-hand menu.



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



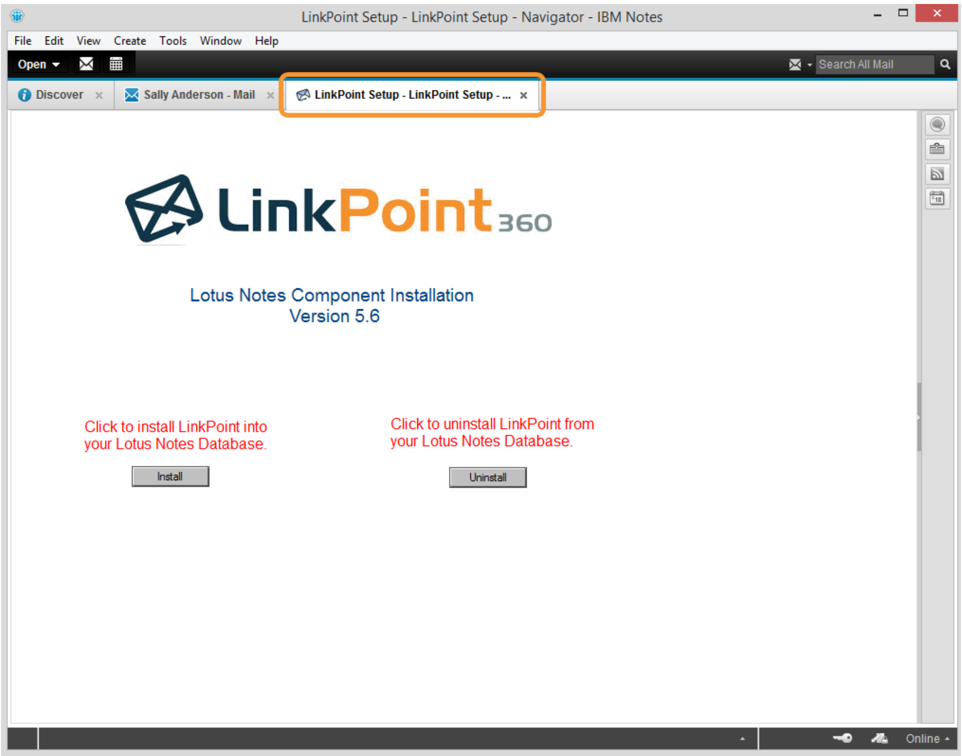
3 Click **Apply** and then click **Ok** to save the changes.



Installing LinkPoint Connect Actions within IBM Notes

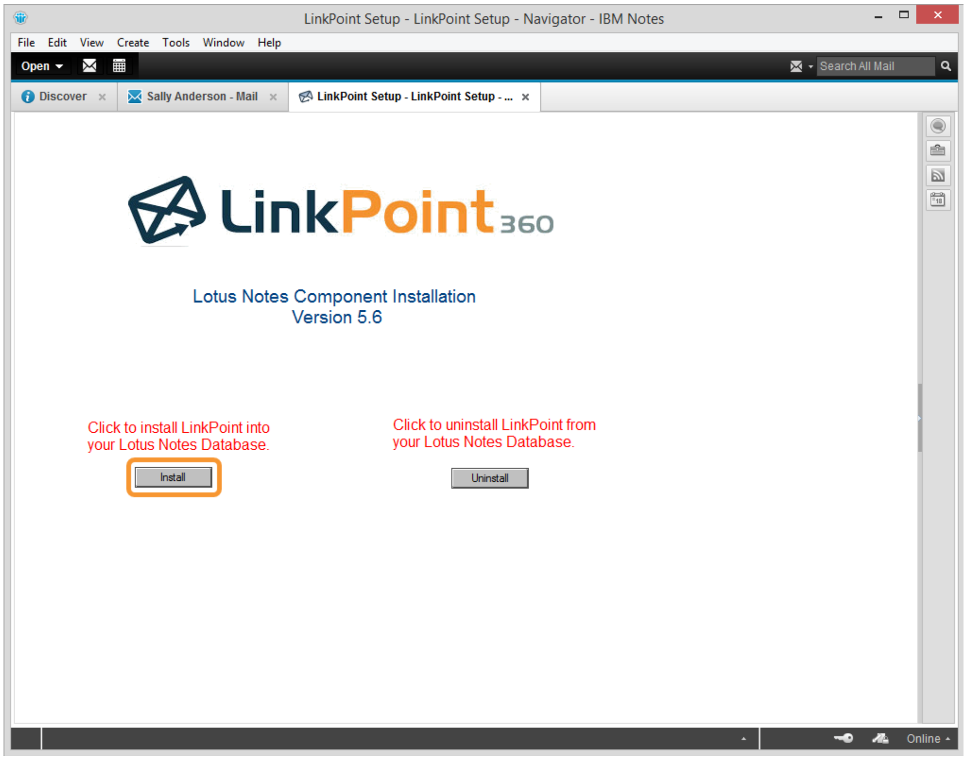
In this section, you will learn how to install LinkPoint Connect action commands and templates in your instance of IBM Notes. These options provide users with additional productivity features during the email drafting and sending processes. This option is only needed during the LinkPoint Connect process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

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

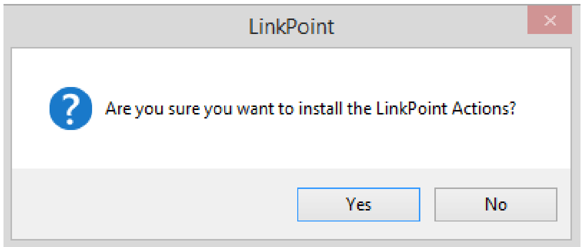


Tip: If the LinkPoint Connect Setup tab is not present, go to Start->Programs->LinkPoint360 and run Complete Installation command. It will start LinkPoint Setup within IBM Notes to install LinkPoint Agents.

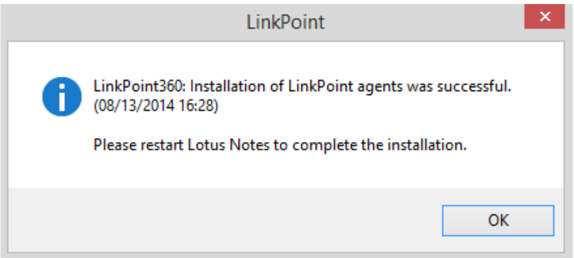
2 Click the **Install** button to install LinkPoint Connect actions within the IBM Notes database.



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



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

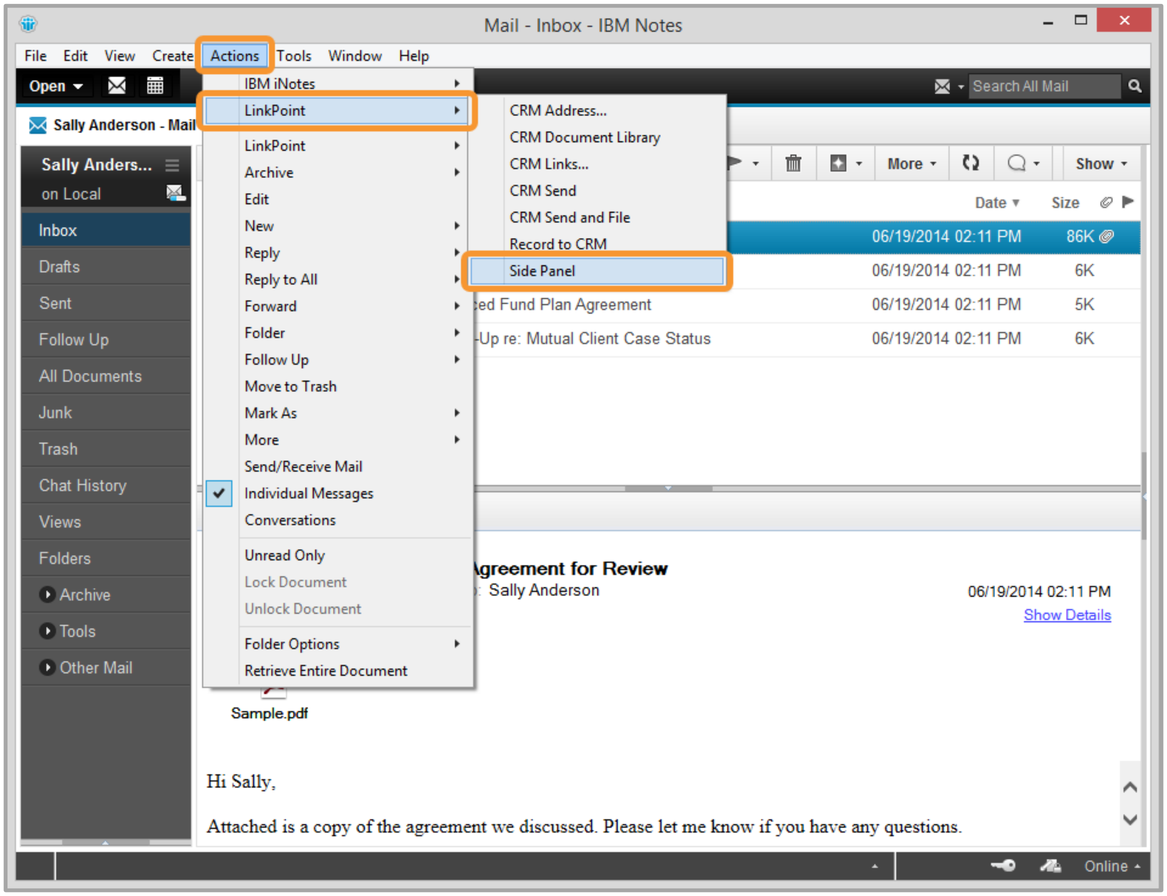


Using the LinkPoint Connect Panel in IBM Notes

Showing and Hiding the LinkPoint Connect Side Panel

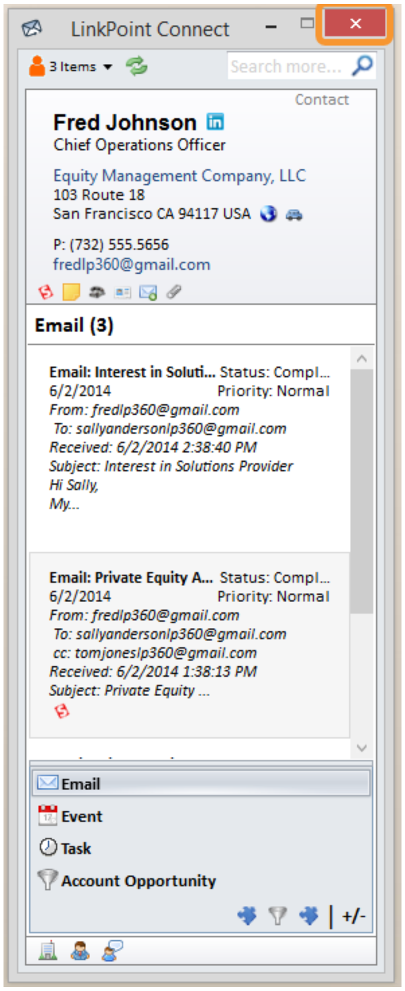
The LinkPoint Connect Side Panel is designed to enable users to spend the majority of their time working directly within IBM Notes and still see content that is updated in real time from Salesforce. Users can also jump directly to specific records in Salesforce, without the need to search and scroll 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 Salesforce and lets users access the information dynamically.

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



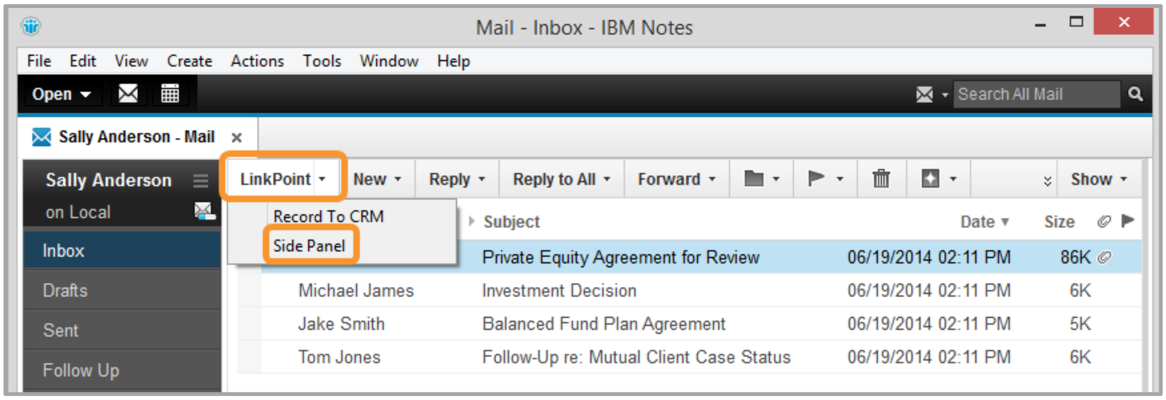
2

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



3

Select **LinkPoint** from the toolbar and select **Side Panel** from the drop-down list to activate the Side Panel.

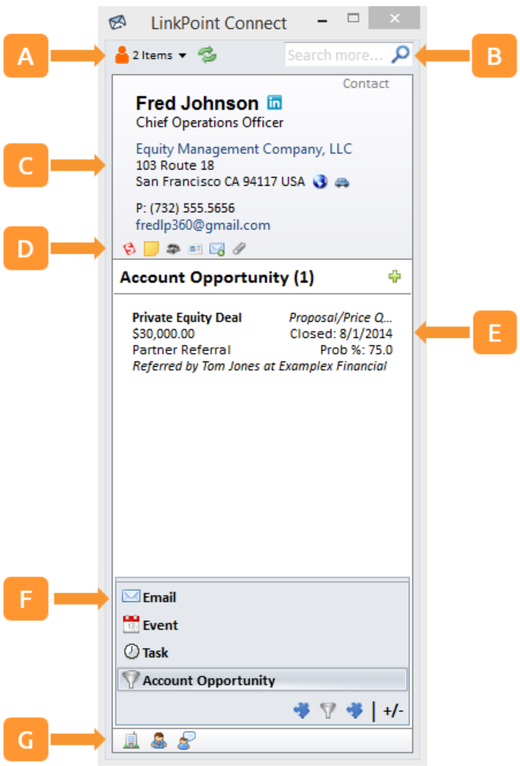


Viewing Salesforce Data in IBM Notes

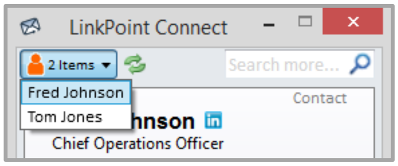
The LinkPoint Connect Side Panel enables users to view their Salesforce CRM data directly within IBM Notes. This section will demonstrate the types of information that are accessible within the LinkPoint Connect Side Panel and how users can interact with the data.

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

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

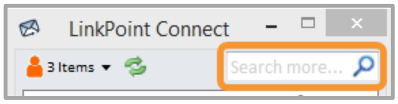


A **Contact List:** All contacts included in the To, From, Cc, and Bcc fields for the selected email are listed and available for reference. Select one from the list to view the Salesforce information for that record within the LinkPoint Connect Side Panel.



B

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



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

C

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

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

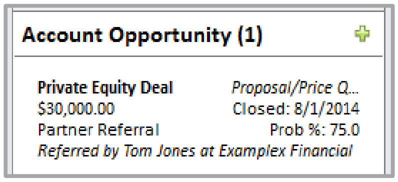
D

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

Icon	Action
	Launches a LinkedIn search in a new browser window displaying profiles that match the contact's first name, last name, and company.
	Displays the contact's address in Google Maps
	Displays driving directions
	Opens the record in Salesforce
	Opens a new Note in Salesforce for the specific contact
	Opens a new call log in Salesforce for the specific contact
	Copies the current record to the Lotus Notes address book
	Records the selected email to the contact in Salesforce
	Records attachments to the specific contact in Salesforce
	Creates a new item based on the related information

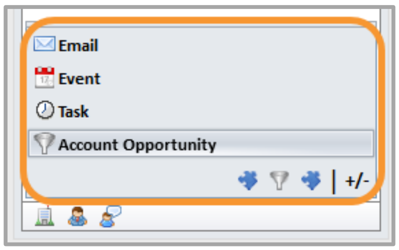
E

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



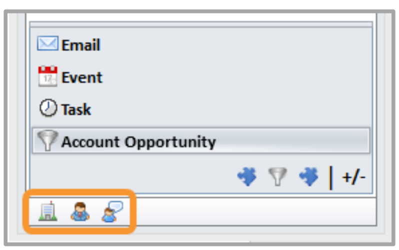
F

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



G

Drop Zone: Create new contacts, leads, or accounts by highlighting an email signature, clicking down on the selection, and then 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 Salesforce content within IBM Notes.

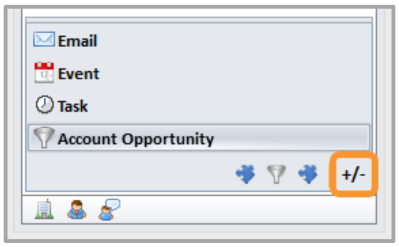
4 Scroll through the content in the Quick View window. Click the arrows to move between Salesforce items by clicking the arrows.

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

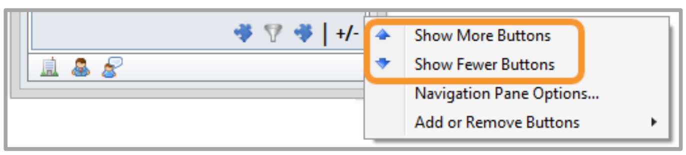
Enabling and Disabling LinkPoint Connect Side Panel Navigation Pane Items

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

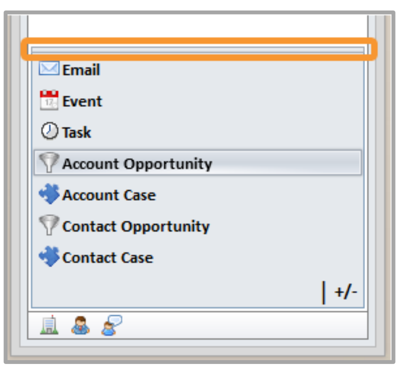
1 Navigate to the LinkPoint Connect Side Panel, and click the **+/-** icon in the bottom right of the **Navigation Pane**.



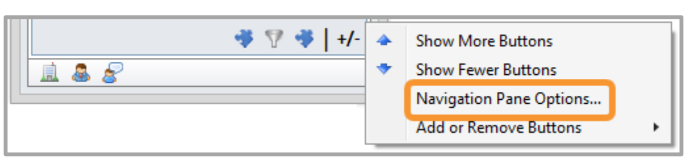
2 Select the option to **Show More Buttons** to add to the list of items available in the Navigation Pane. Select **Show Fewer Buttons** to reduce the number of items available.



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

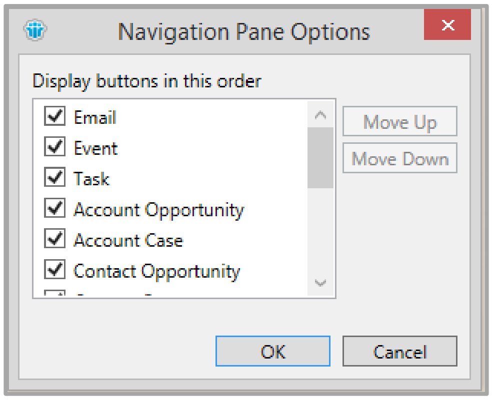


3 Select **Navigation Pane Options…**



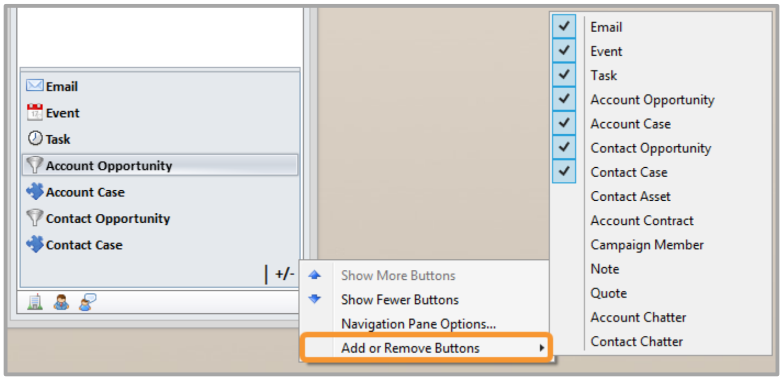
4

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



5

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



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

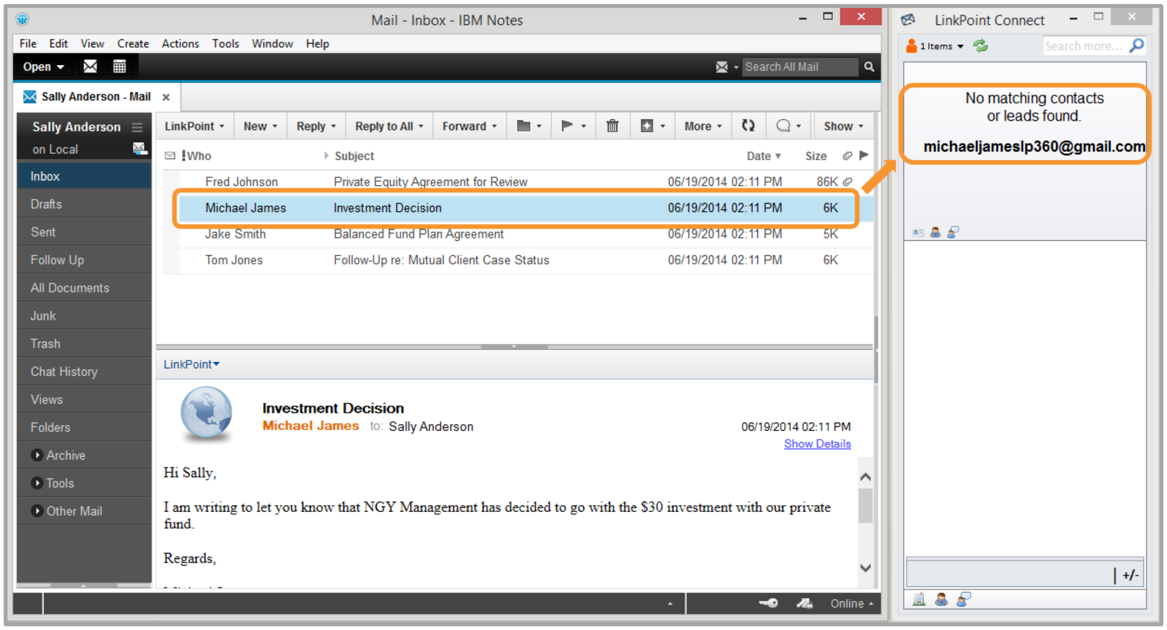
Creating Salesforce Records from IBM Notes

Creating a New Salesforce 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 Salesforce. This can be done easily from IBM Notes.

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

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

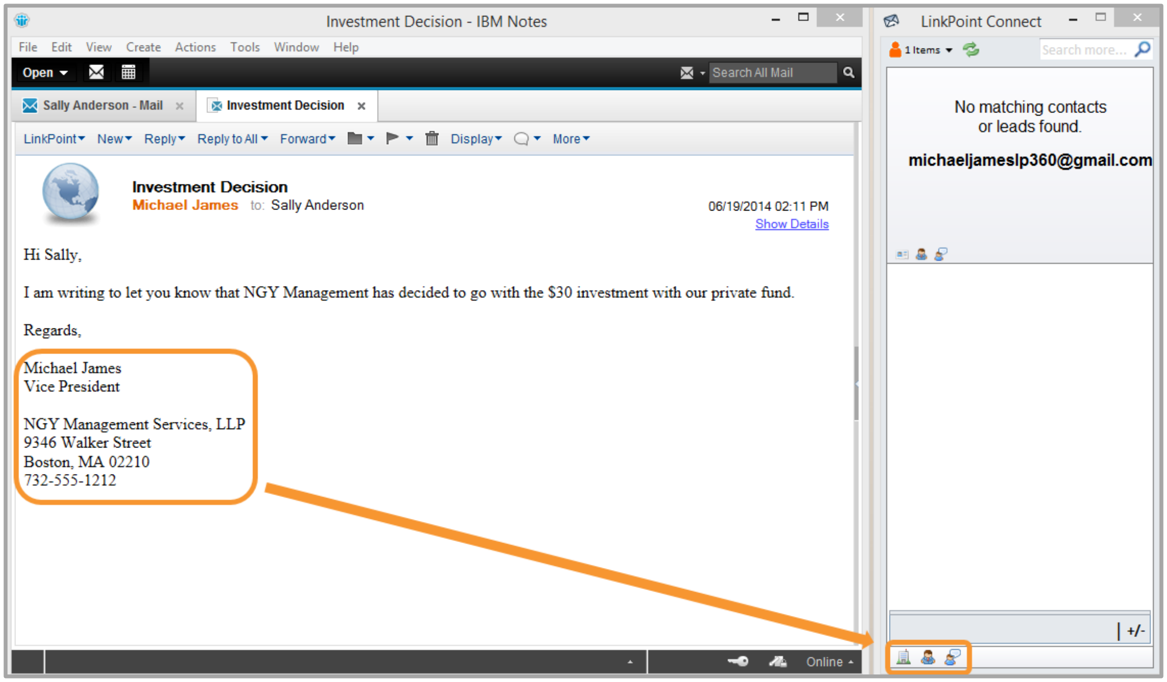


Tip: LinkPoint Connect searches for contacts based on primary email address. If you receive an email from an existing contact and the LinkPoint Side Panel does not return a matching contact, it is possible that the contact may be in Salesforce under a different or secondary email address. You can verify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

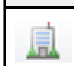
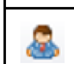
Additional Resources: LinkPoint360 can customize the Search Bar to include results from custom fields including secondary email addresses. Please contact the LinkPoint360 Support Team for more information.

2

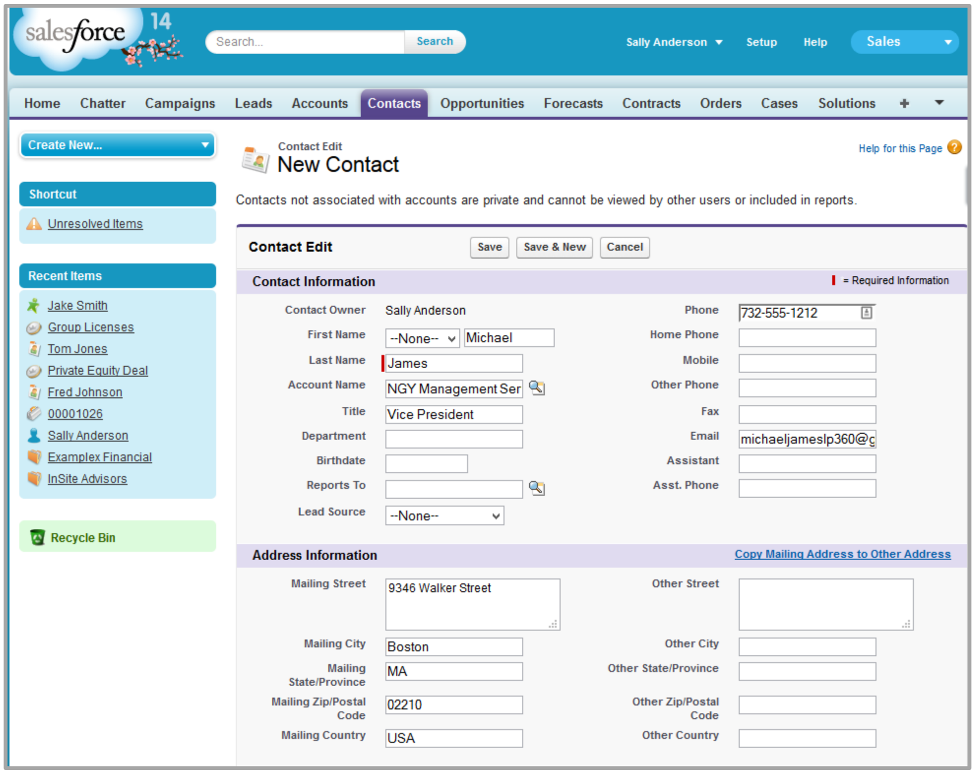
Highlight the signature within the email. Drag and drop the highlighted signature to the Drop Zone at the bottom of the LinkPoint Connect Side Panel. Release the selection over the contact type you want to create. This will launch Salesforce in your Internet browser.



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

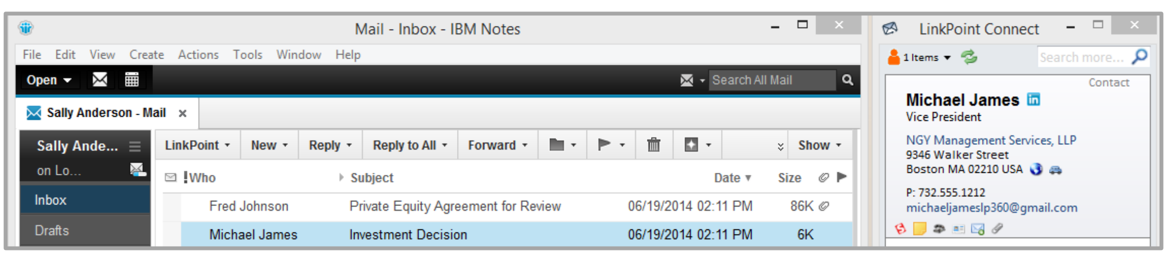
Icon	Action
	Creates a new Account in Salesforce
	Creates a new Contact in Salesforce
	Creates a new Lead in Salesforce

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



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

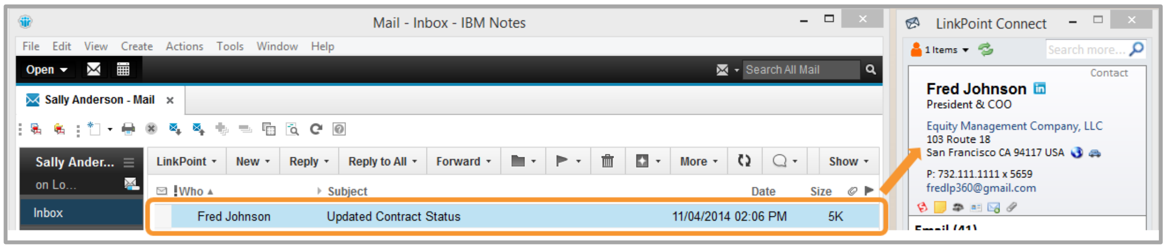
4 Return to IBM Notes and select the email from the new contact. Note that the LinkPoint Connect Side Panel now displays the contact information from Salesforce.



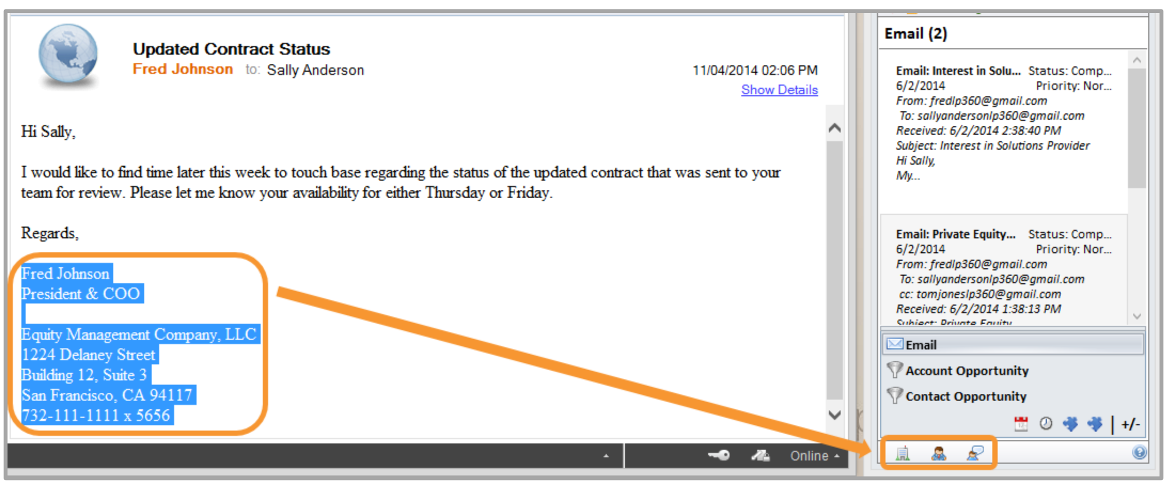
Using Active Update to Update Contacts in Salesforce

LinkPoint Connect users can now update existing contacts in Salesforce directly from IBM Notes. Contact information for prospects and clients can change often, with new job titles as part of a promotion or even new phone numbers and email addresses as part of mergers and acquisitions. As users receive communication from contacts, they can easily identify any new information and choose the contact details to update or keep. Active Update is an enhancement to LinkPoint Connect's contact creation tools featuring easy drag and drop functionality. In this section, you will learn how to update Salesforce contacts using Active Update.

1. Select an email from an existing contact. Note that the LinkPoint Connect Side Panel searched Salesforce for the contact and found a matching record based on the sender's email address.



2. Highlight the signature within the email. Drag and drop the highlighted signature to the **Drop Zone** at the bottom of the LinkPoint Connect Side Panel. Release the selection over the contact type you want to update.

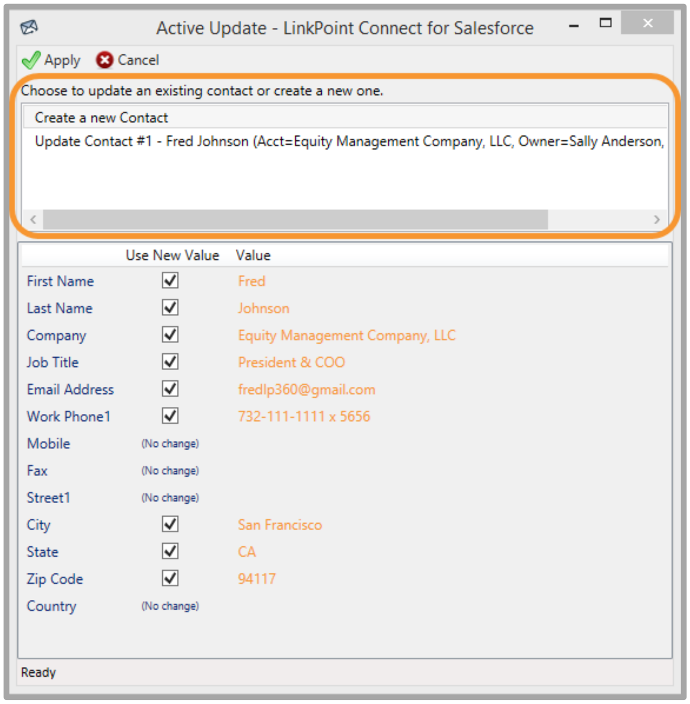


Tip: Users can update Accounts, Contacts, or Leads by releasing the email signature over the corresponding icon in the Drop Zone.

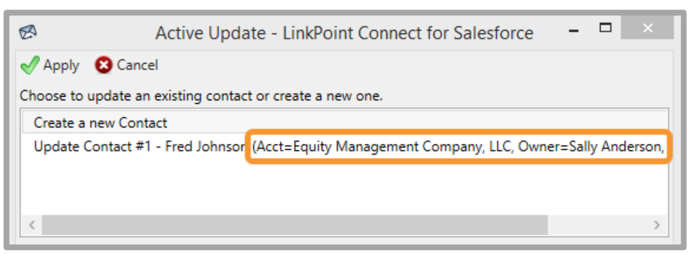
Icon	Action
	Creates a new Account in Salesforce
	Creates a new Contact in Salesforce
	Creates a new Lead in Salesforce

3

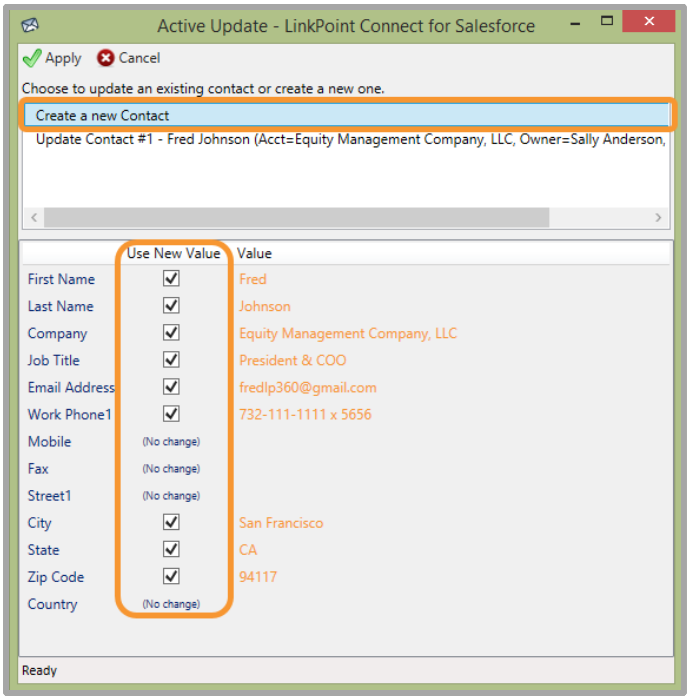
Review the contact information in the **Active Update** window. LinkPoint Connect will search Salesforce and identify any matching records and list them in the top portion of the window.



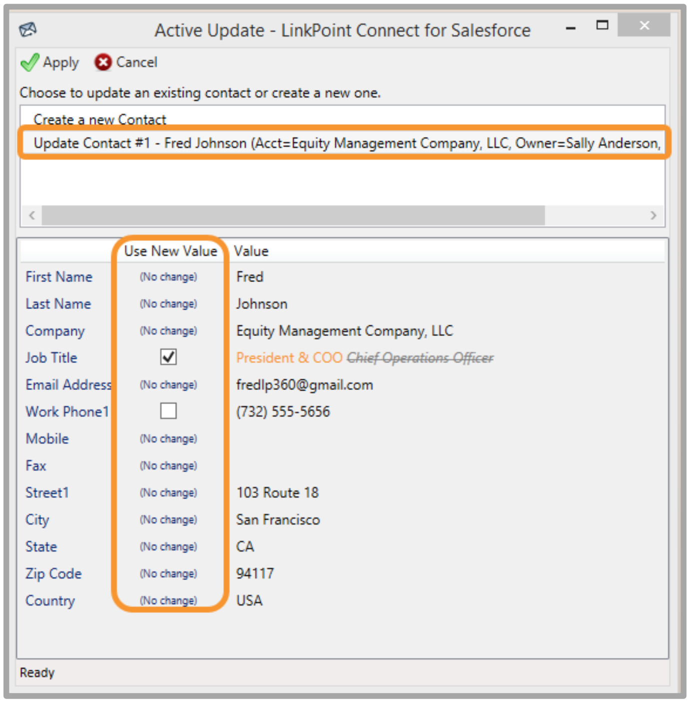
Tip: You can review some record details, such as the Account and Owner, in the information next to the contact to be sure you are working with the right record before making any changes.



4a Select **Create a new Contact** to create a new Salesforce record. Confirm the information to include in the new Contact record by selecting or deselecting the checkboxes for each information field.



4b Select a Contact to update from the list. Select a checkbox for a field to overwrite the existing Salesforce record with the new information for that field. Deselect a checkbox to keep the existing value in Salesforce.

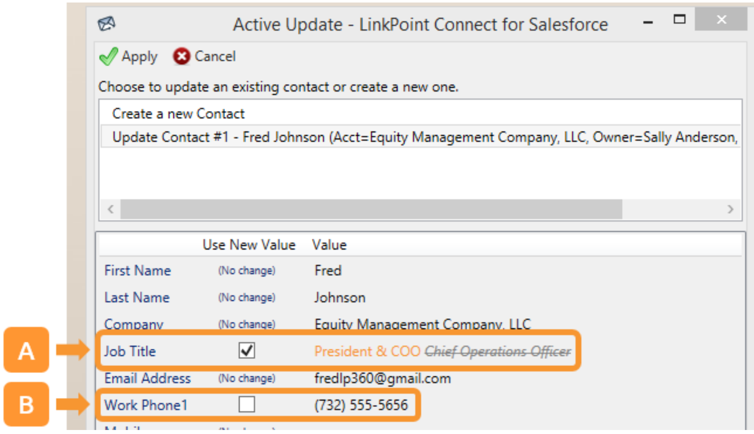


Tip: Active Update will display the Contact record fields on the left and the existing field values as they appear currently in Salesforce on the right. The middle column shows you whether or not the information from the email signature is new. If the information for a field has not changed, it will display **(No change)**. If the details in the email signature are different than the information in Salesforce, the existing Salesforce data will appear in grey, italics, and strikethrough. The new value will be displayed in orange. If you deselect the checkbox, the original data from Salesforce will be displayed.

Example: In this example, we have identified an existing Salesforce record that requires an update. Only two fields are different between the record for Fred Johnson in Salesforce and the new email signature for Fred Johnson.

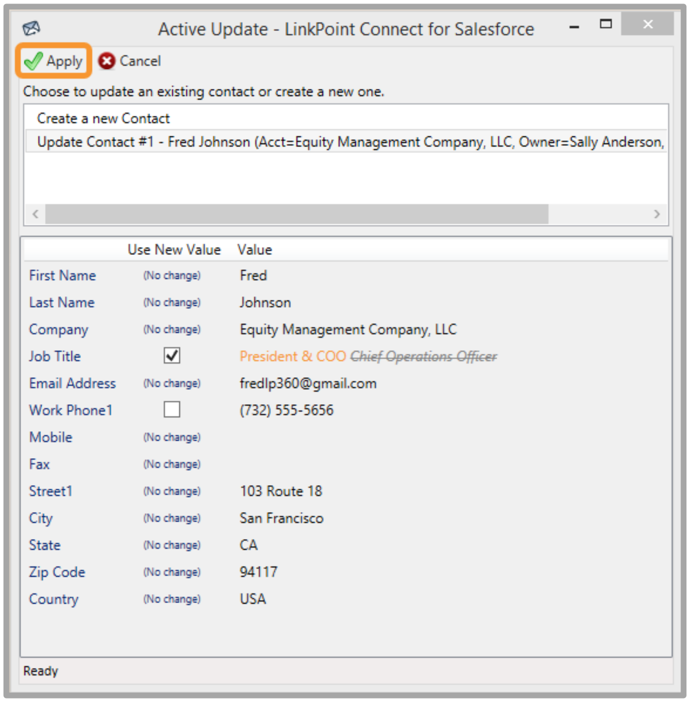
A. For Job Title, we have selected the checkbox to **Use New Value**. We know that Fred Johnson has a new title and want to use the new information. The old information appears crossed out, so we know what will be replaced.

B. For Work Phone 1, we have deselected the checkbox to Use New Value. While Fred listed a new phone number in his email signature, we know that the number we already have on his Salesforce record is the best number to reach him with. The old information appears with no changes and will not be overwritten after we apply the updates.



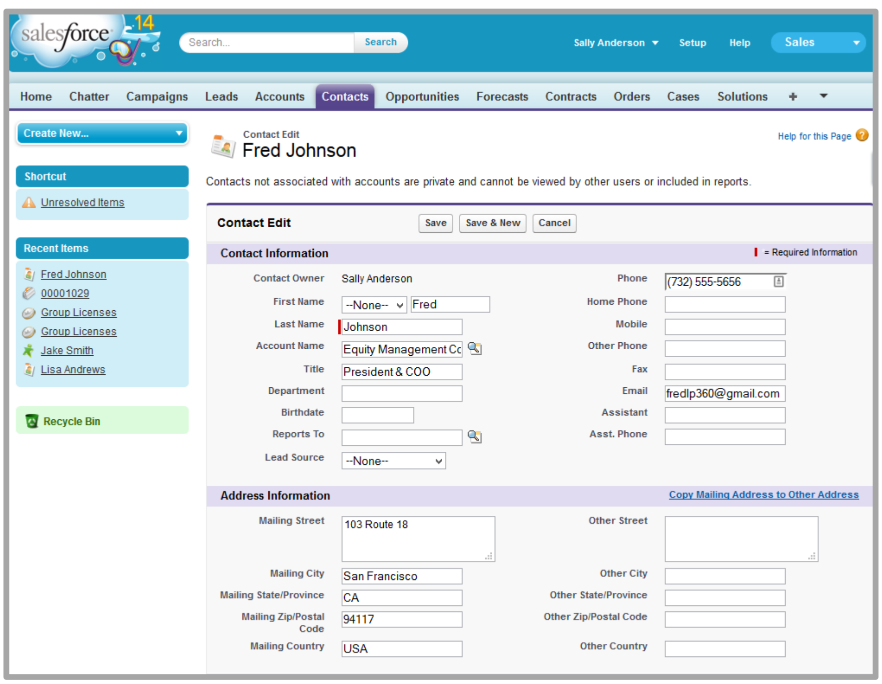
5

Click **Apply** to finalize the selection. This will launch Salesforce in the Internet browser.

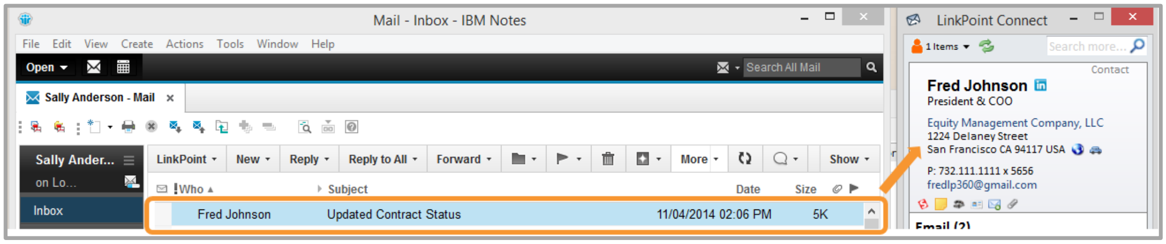


6

Review the contact information within Salesforce and save the changes.



7 Return to IBM Notes and select the email from the contact. Note that the LinkPoint Connect Side Panel now displays the updated contact information from Salesforce.

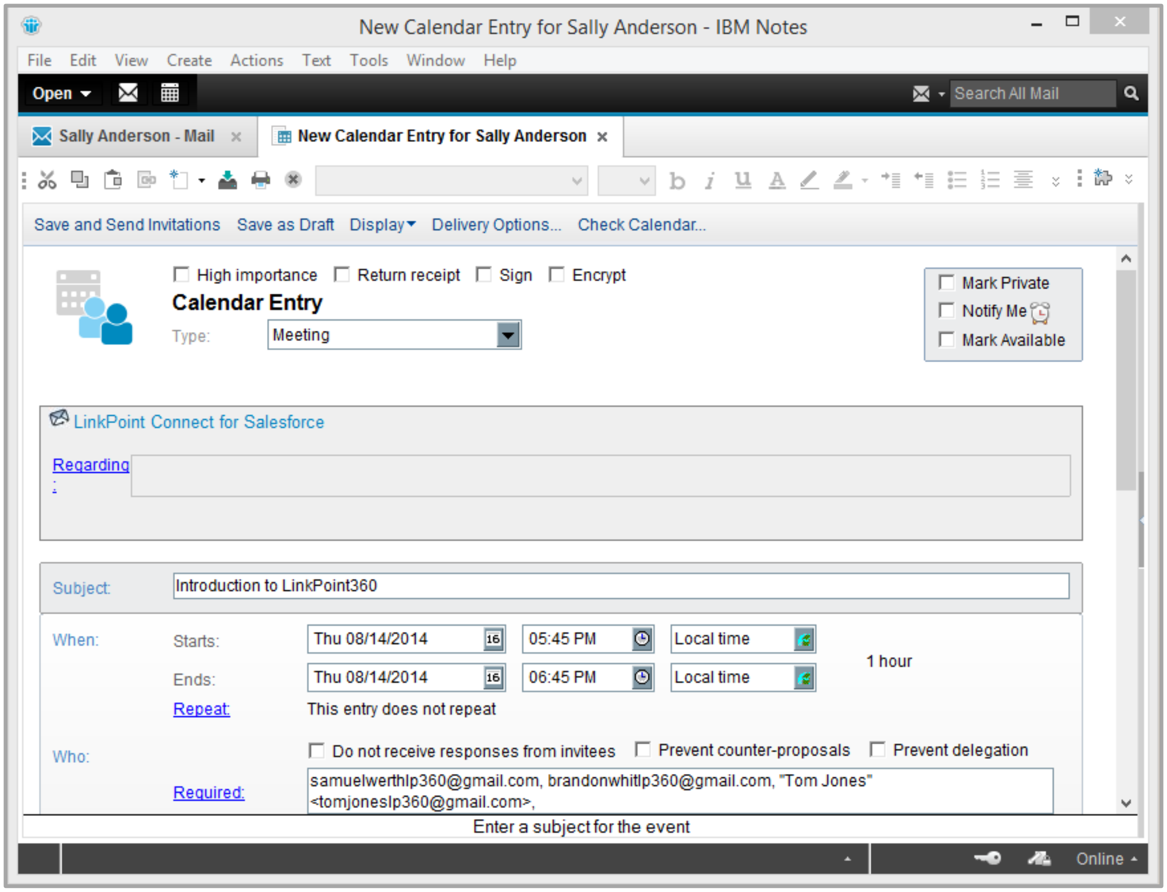


Relating a New IBM Notes Calendar Item to an Existing Salesforce Record

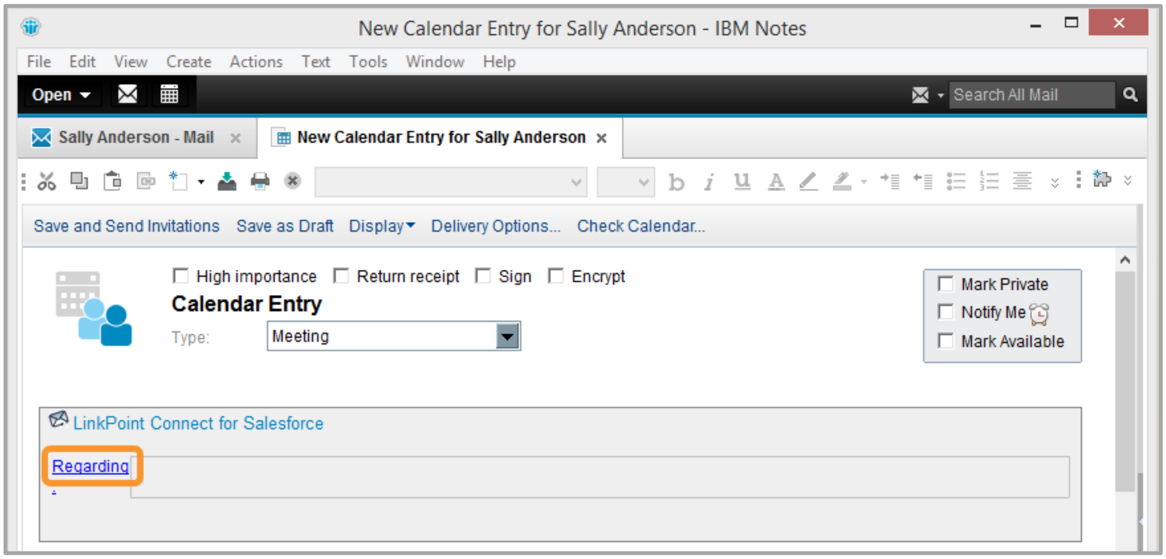
LinkPoint Connect promotes CRM adoption by offering a variety of shortcuts to encourage users to add new contacts, opportunities, and accounts to Salesforce. This can be done easily from IBM Notes. In this section, you will learn how to relate new calendar items such as Meetings and Appointments in IBM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

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

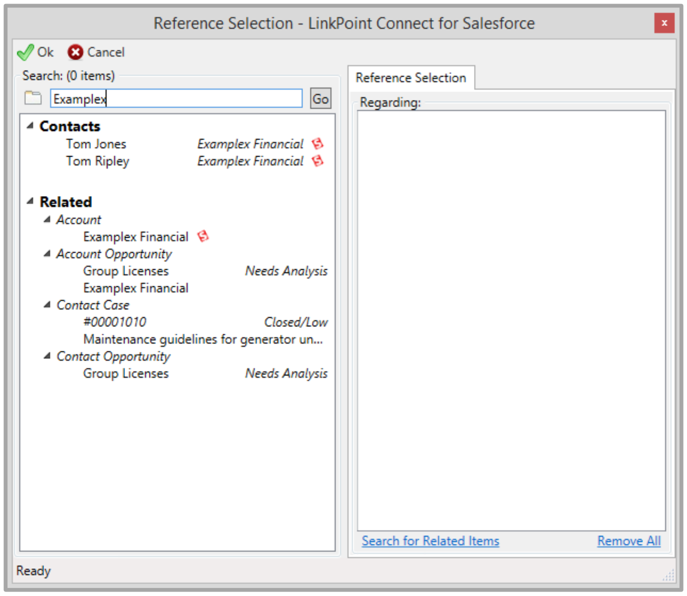
1 Open the **New Meeting** screen in IBM Notes and enter information for the meeting including the attendees, subject, location, date, time, and content.



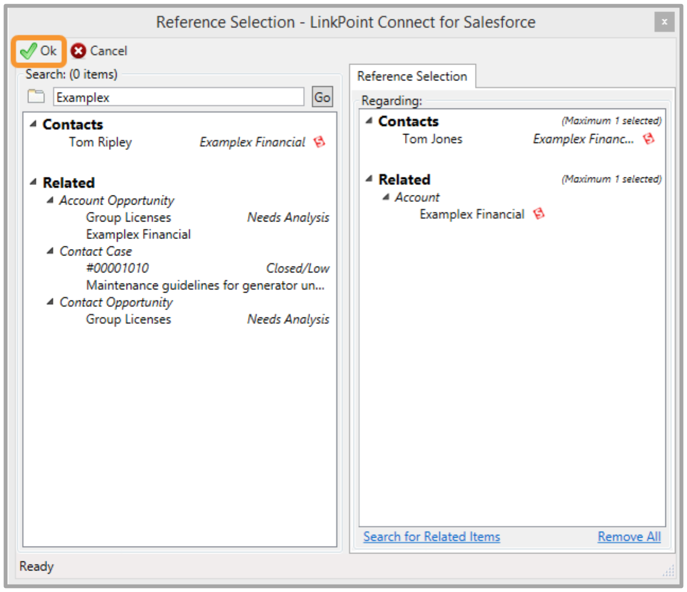
2 Select the **Regarding** link in the LinkPoint Connect for Salesforce section of the new meeting.



3 Search for contacts and other related records such as opportunities or cases that correspond with the new meeting. Enter partial or full search terms in the **Search** field and click the **Go** button. Review the list of search results on the left pane.

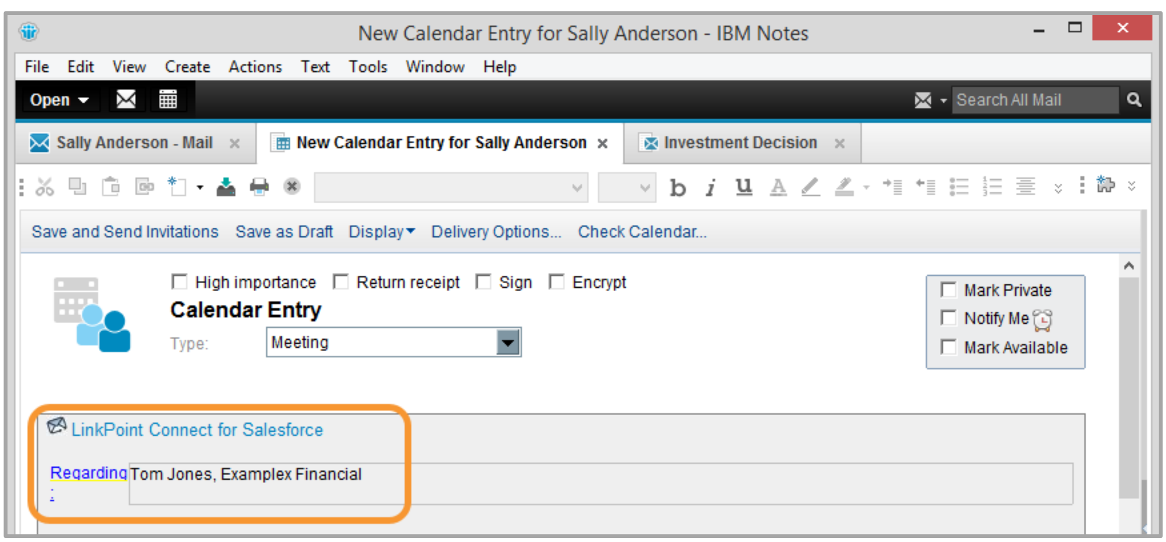


4 Double click items on the left pane or click the green arrow to add them to the **Regarding** pane. Double click items on the **Regarding** pane or click the red x to remove them. Click the **Ok** button to continue.



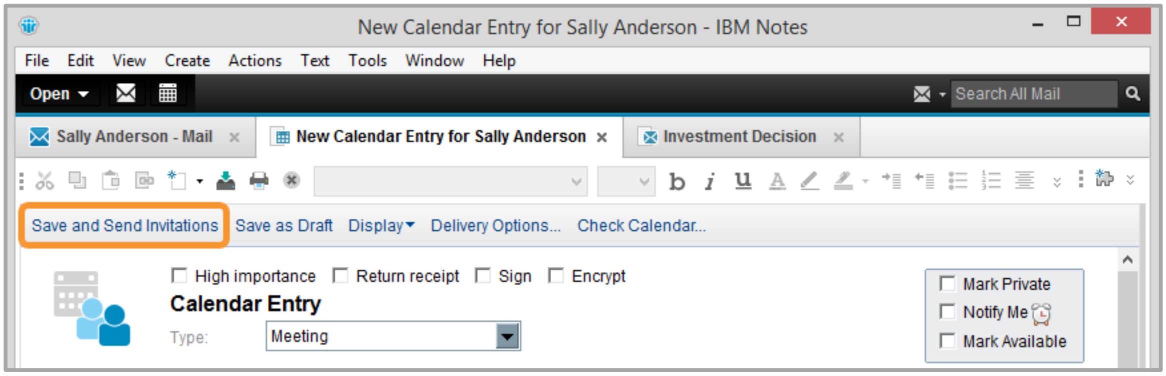
Tip: Some organizations configure their instance of Salesforce to limit association of records to one "who" (or contact) and one "what" (or item such as case or opportunity). In this instance, you will only be able to assign or relate the item to one contact and one record in Salesforce. If your organization enables recording to multiple contacts and/or multiple record types, you will be able to select these items in the Reference Selection window in LinkPoint Connect. Please speak with your internal Salesforce admin to learn more about how your organization uses this feature. Contact LinkPoint360 Support for assistance with enabling LinkPoint Connect to mirror your Salesforce processes.

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



6

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

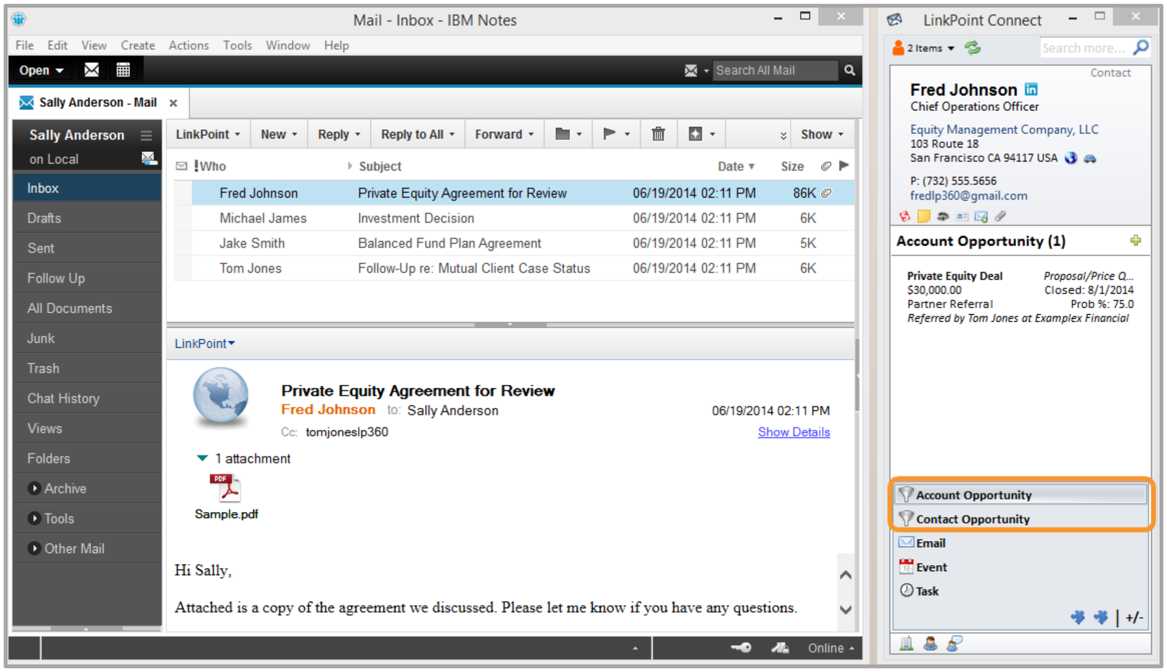


Creating a New Salesforce Opportunity from IBM Notes

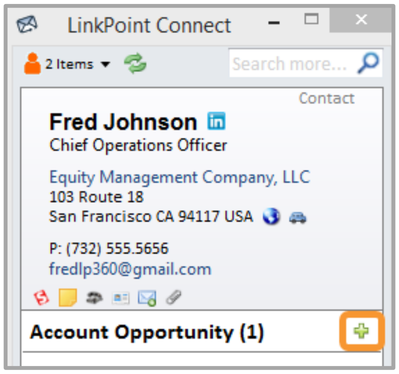
LinkPoint Connect promotes CRM adoption by offering a variety of shortcuts to encourage users to add new contacts, opportunities, and accounts to Salesforce. This can be done easily from IBM Notes.

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

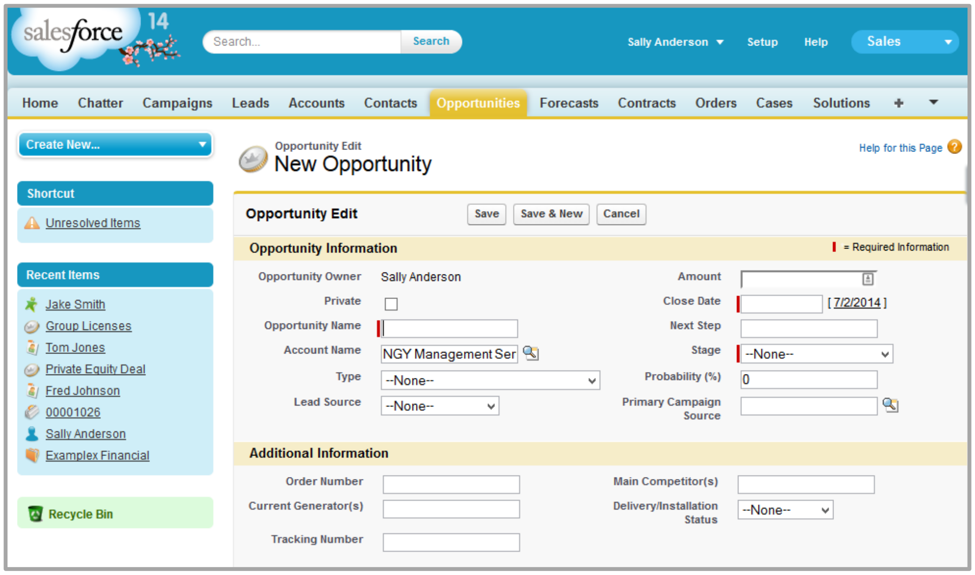
1. Select an email and note that the LinkPoint Connect Side Panel displays the related contact information. Select **Account Opportunity** or **Contact Opportunity** on the Navigation Pane to display the Related Information for the contact.



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

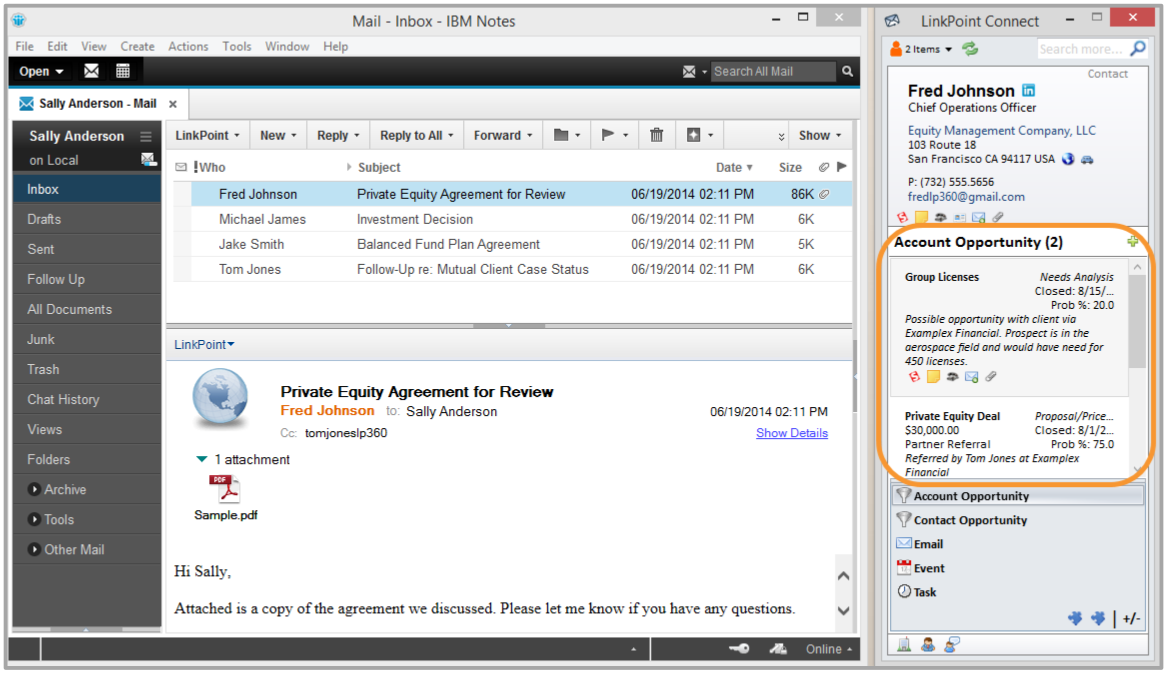


3 Enter any required or additional information in the Salesforce Opportunity record. Note that the Account Name field is prepopulated within Salesforce by LinkPoint Connect. Click **Save** to create the record.



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

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

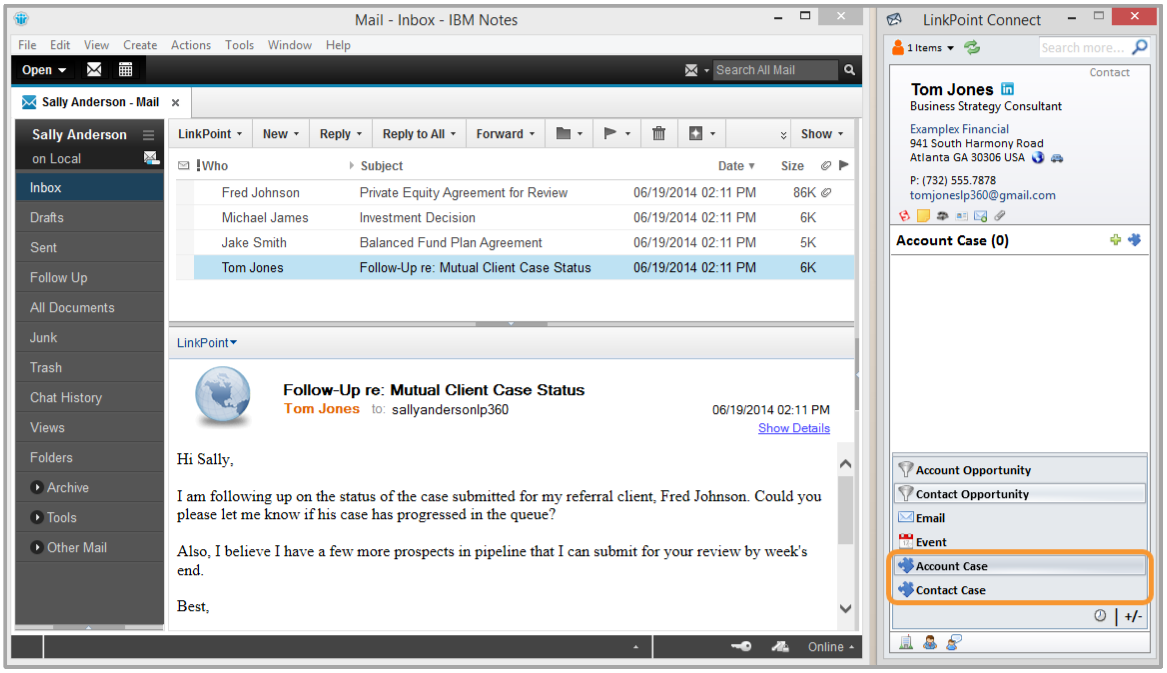


Creating a New Case in Salesforce from IBM Notes

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

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

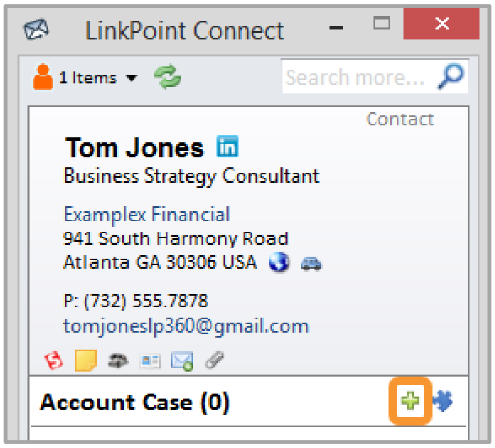
1 Select an email and note that the LinkPoint Connect Side Panel displays the related contact information. Select **Account Case** or **Contact Case** on the Navigation Pane to display the Related Information for the contact.



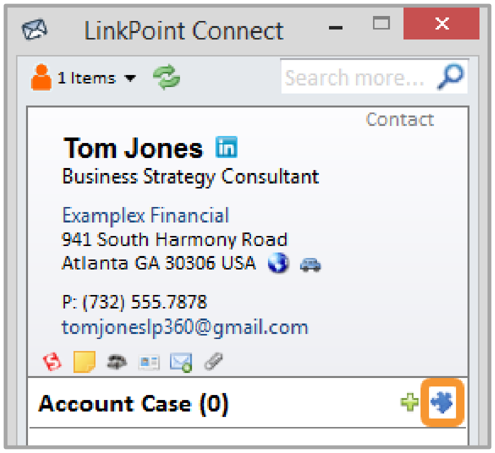
Tip: Organizations can request customizations to modify the case types and information displayed. In some instances, users may not have access to case information or may not see details displayed for specific case types such as closed cases. Please contact the LinkPoint360 Support Team for more information.

2

Click the **Create a new item** icon to create a new case. This will launch Salesforce in your Internet browser.

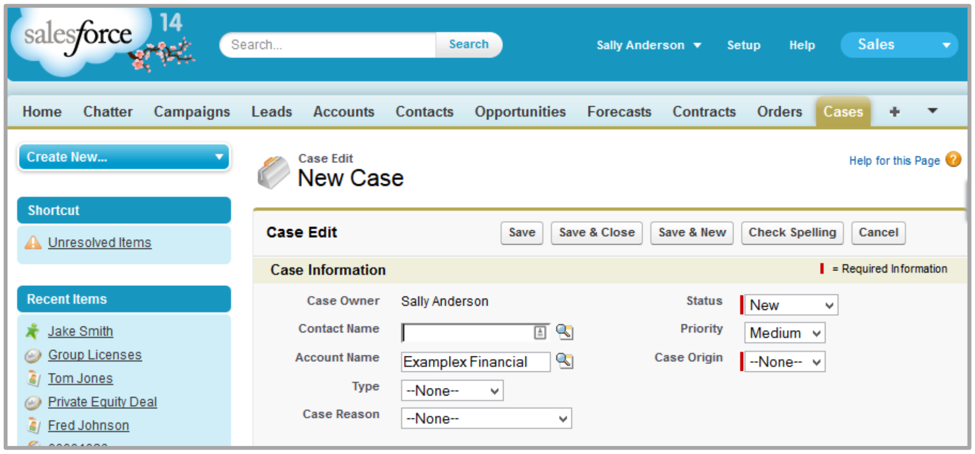


Tip: Click the **Create a case from selected email** icon to create a case using the email. This will launch Salesforce in your Internet browser.



3

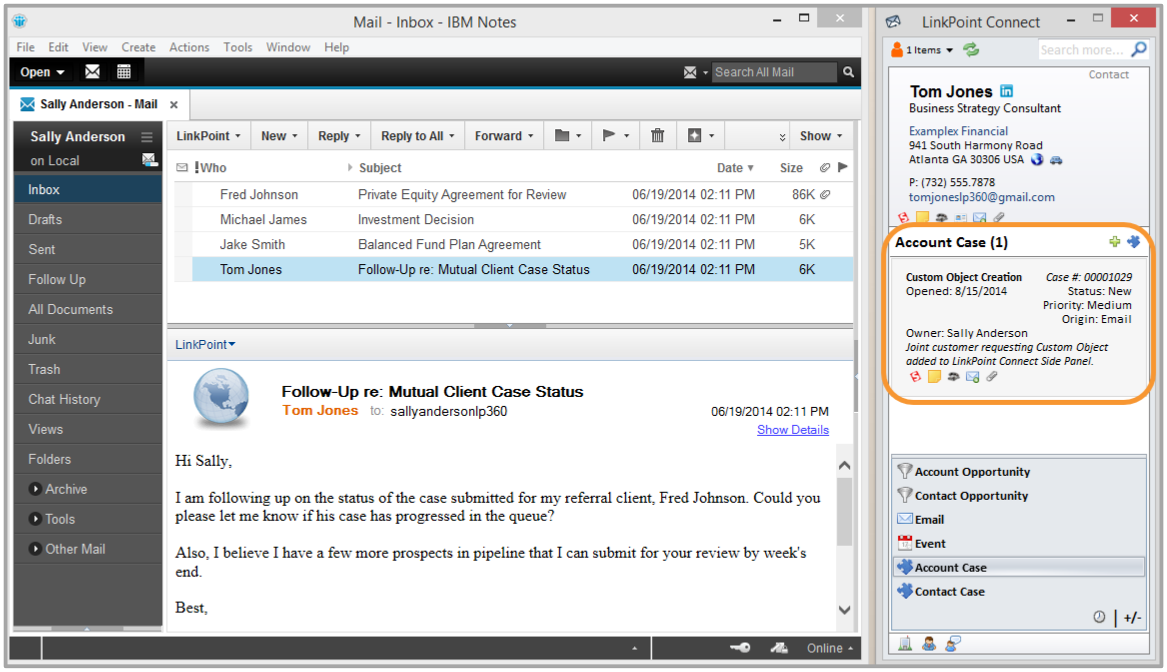
Enter any required or additional information in the Salesforce Case record. Note that the Account Name is prepopulated within Salesforce by LinkPoint Connect. Click **Save** to create the record.



Tip: LinkPoint Connect will not override any existing business rules within your instance of Salesforce. 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 Salesforce.

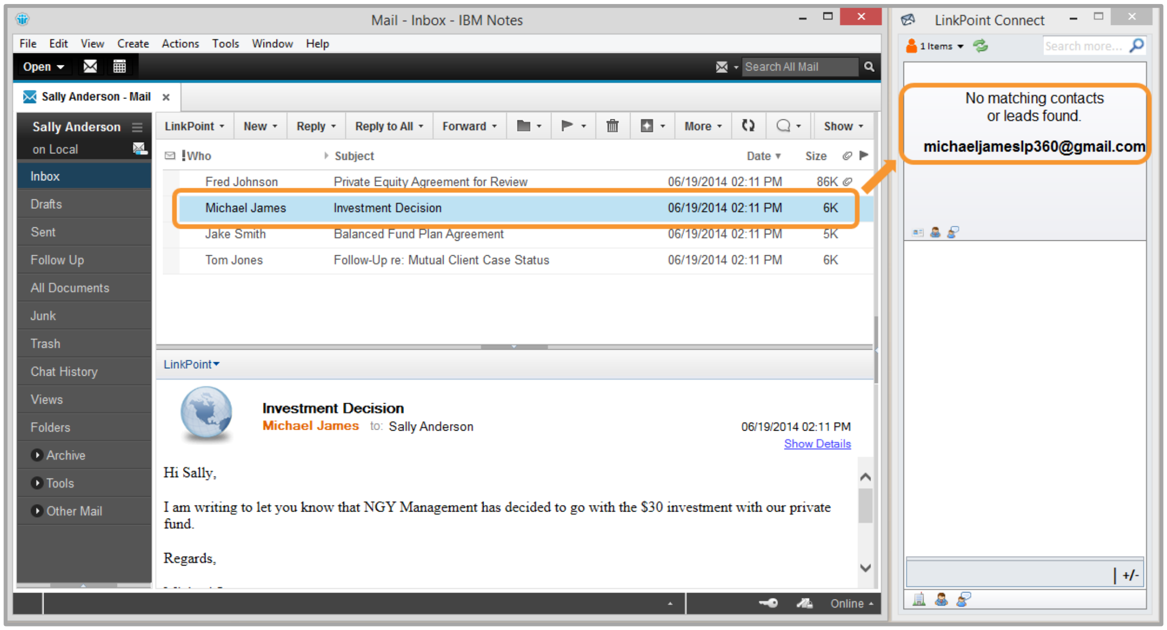


Creating a New Account in Salesforce from IBM Notes

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

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

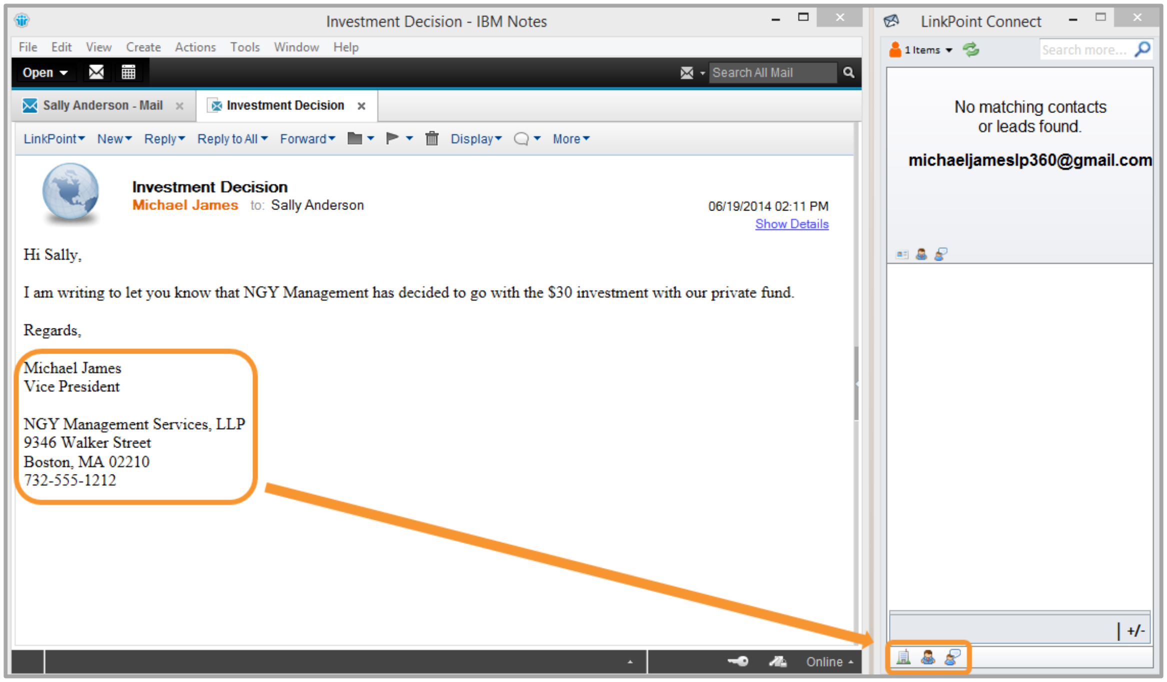
1 Select an email from a new contact. Note that the LinkPoint Connect Side Panel searched Salesforce for the contact and was unable to return a record matching the sender's email address.



Tip: LinkPoint Connect searches for contacts and matching accounts 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 Salesforce under a different or secondary email address. You can verify before creating a new account by using the Search Bar in the LinkPoint Connect Panel to look for the contact by First and/or Last Name.

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

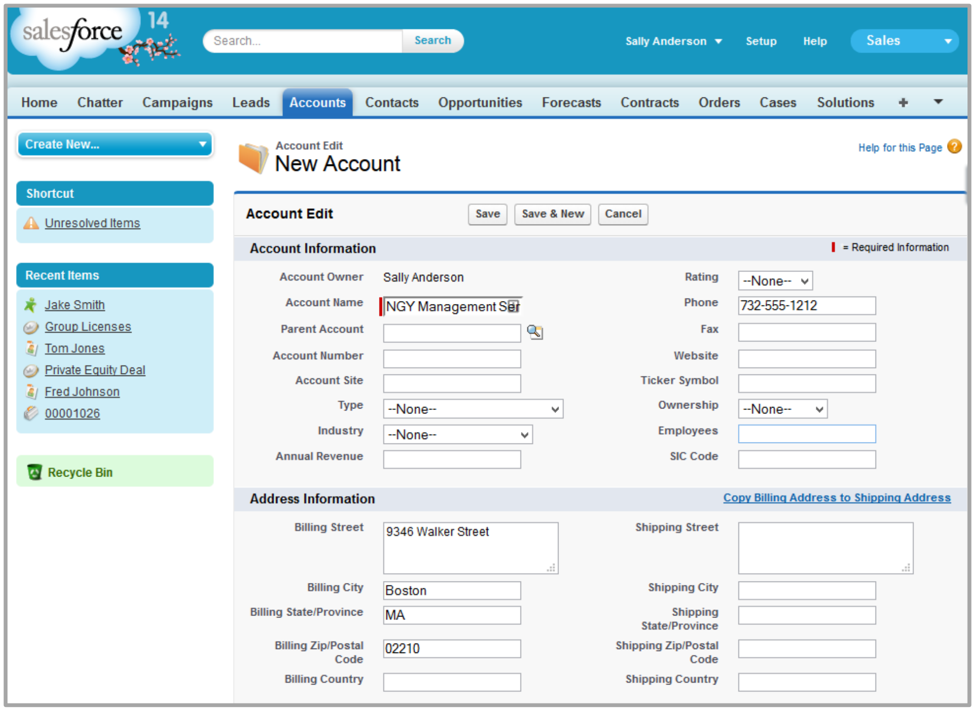
2 Highlight the signature within the email. Drag and drop the highlighted signature to the Drop Zone at the bottom of the LinkPoint Connect Side Panel. Release the selection over the contact type you want to create. This will launch Salesforce in your Internet browser.



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

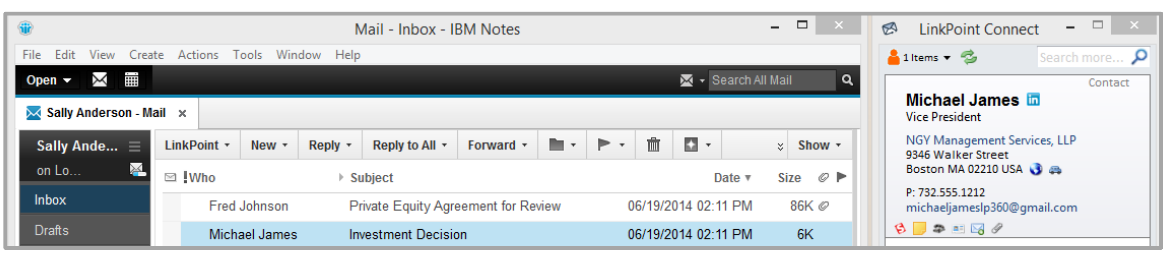
Icon	Action
	Creates a new Account in Salesforce
	Creates a new Contact in Salesforce
	Creates a new Lead in Salesforce

3 Enter any required or additional information to the Salesforce Account record. Note that some fields, such as Phone or Billing Address, are prepopulated within Salesforce by LinkPoint Connect. Click **Save** to create the record.



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

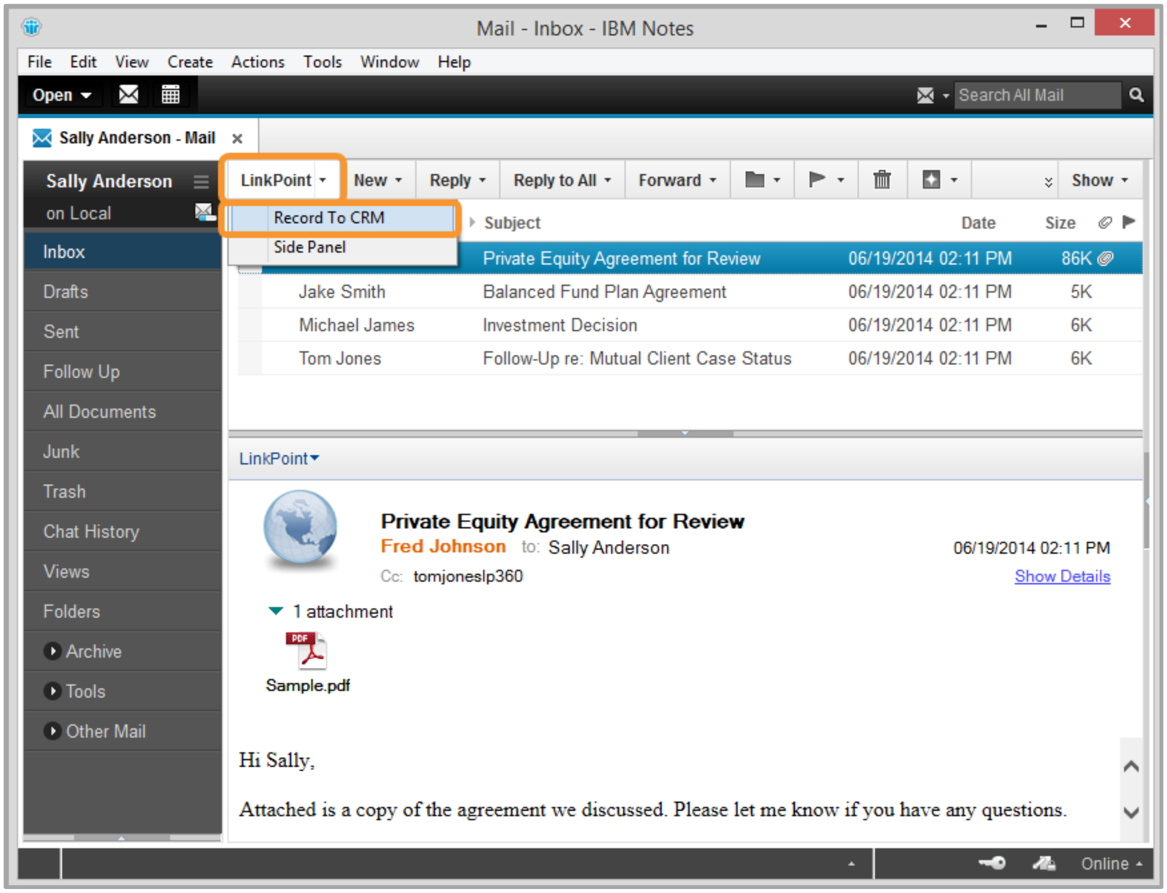
4 Return to IBM Notes and select the email from the new contact. Note that the LinkPoint Connect Side Panel now displays the contact information from Salesforce.



Recording Emails to Salesforce

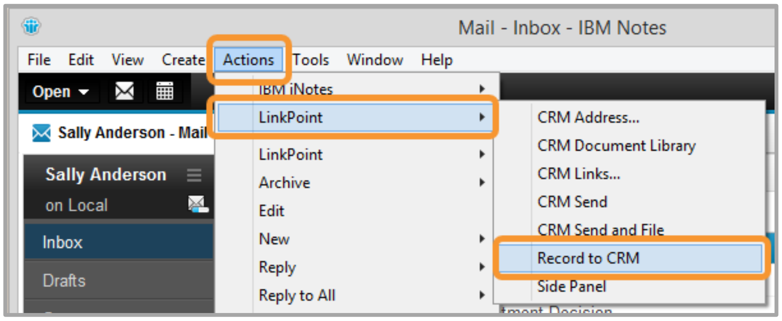
Recording an Email to Salesforce from IBM Notes

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

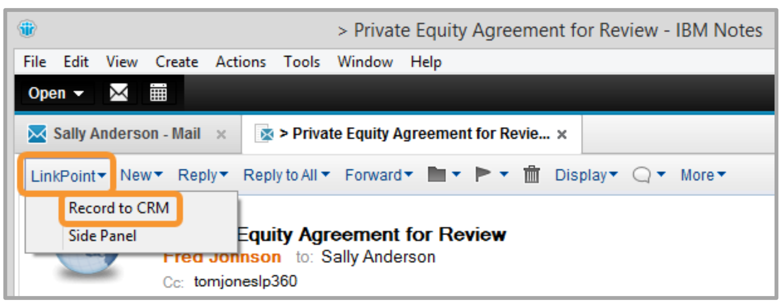


Tip: There are four other ways to access the Record window for LinkPoint Connect. These options may vary depending on how your organization has installed LinkPoint Connect.

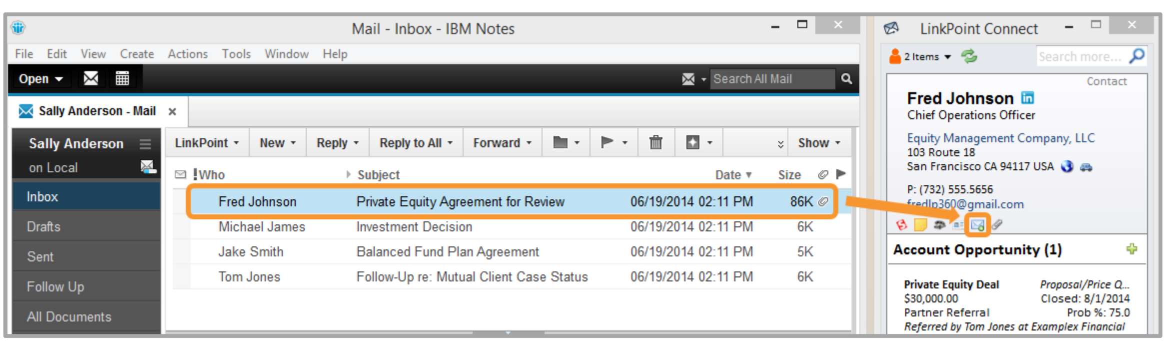
- Select **Actions** from the main menu, select **LinkPoint** from the drop-down menu, and then select **Record to CRM** from the list.



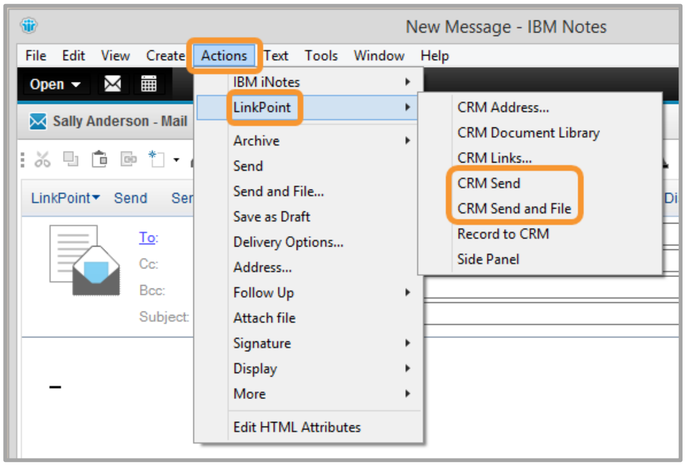
- Within an open email, select **LinkPoint** on the toolbar and select **Record to CRM**.



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

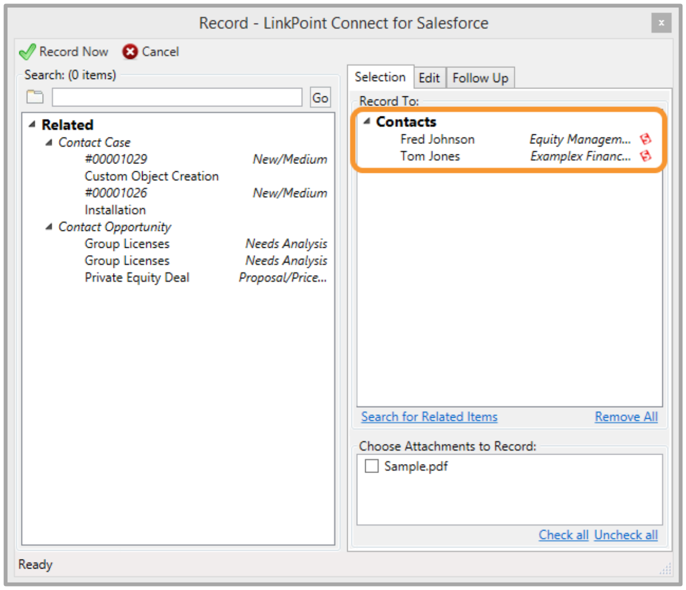


- Create an outbound email. Select **Linkpoint** on the toolbar and select **CRM Send**. Select CRM Send and File if you want to be able to file the email to a specific IBM Notes folder when you are finished recording.

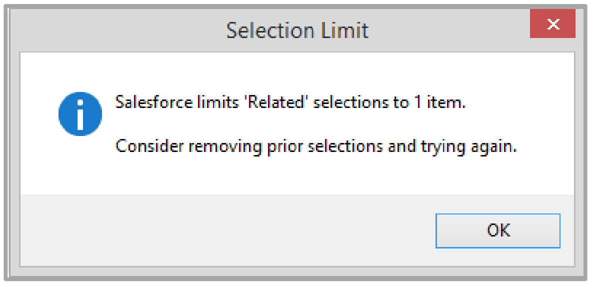


Tip: If you select more than one email in your inbox and then follow the steps to record, the same criteria will be used to record all of the selected emails.

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

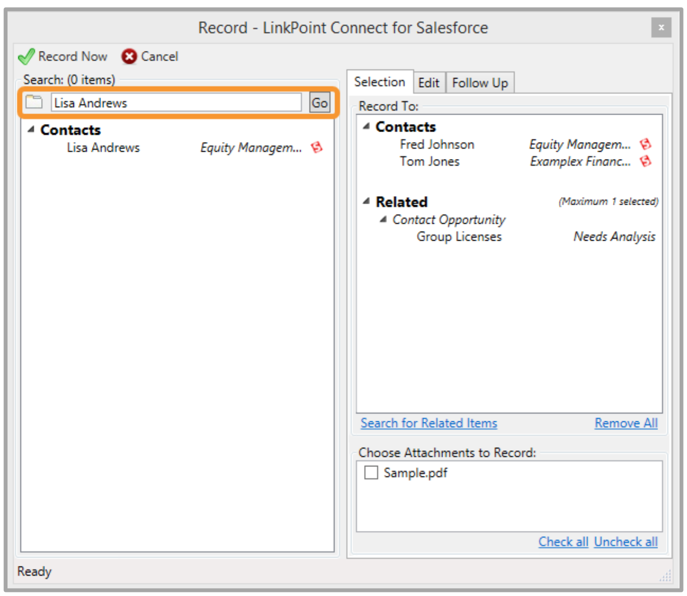


Tip: LinkPoint Connect automatically suggests contacts that appear in Salesforce if they are included in the To, From, Cc, or Bcc fields of the email. If there are no matching contacts in Salesforce, the Record To section will not display any suggestions.

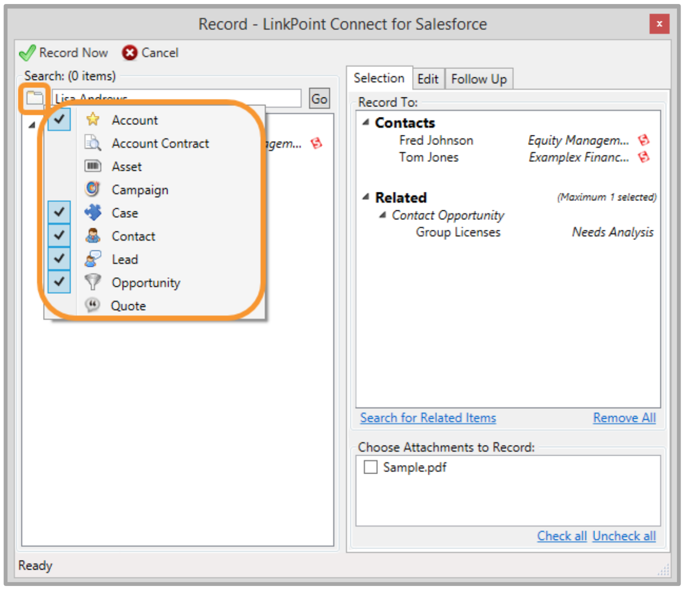


Warning: Salesforce does not allow users to take action on Contacts and Leads at the same time. Try selecting only Contacts or only Leads and record the email.

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

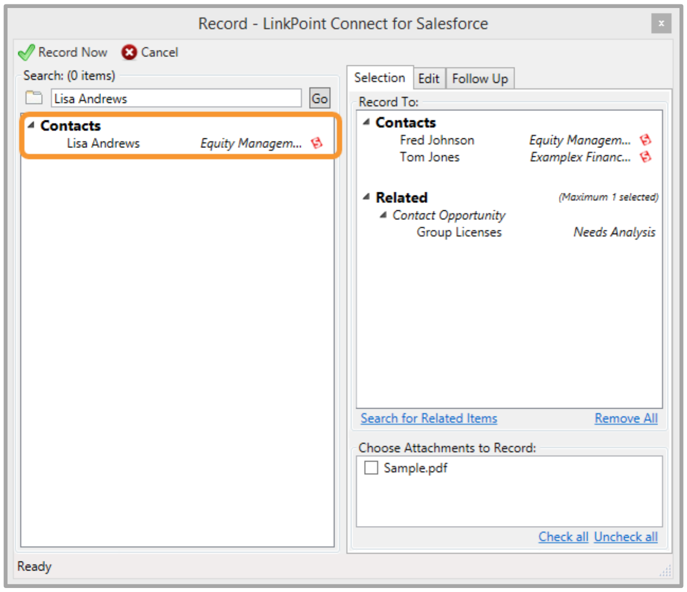


Tip: Click the file folder to the right of the Search bar in the Record window. You can select the object types to include in the search results as options to record to. LinkPoint360 recommends selecting **Account**, **Contact**, and **Lead** so that all contact types are available for search when recording.

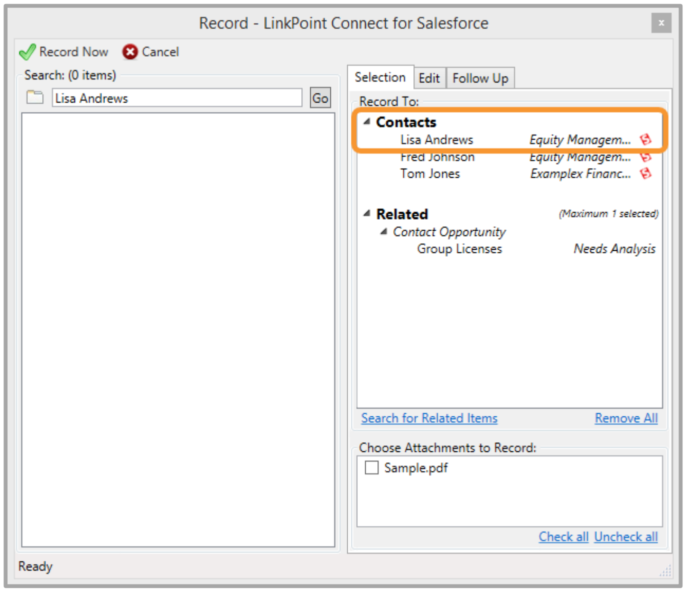


4

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

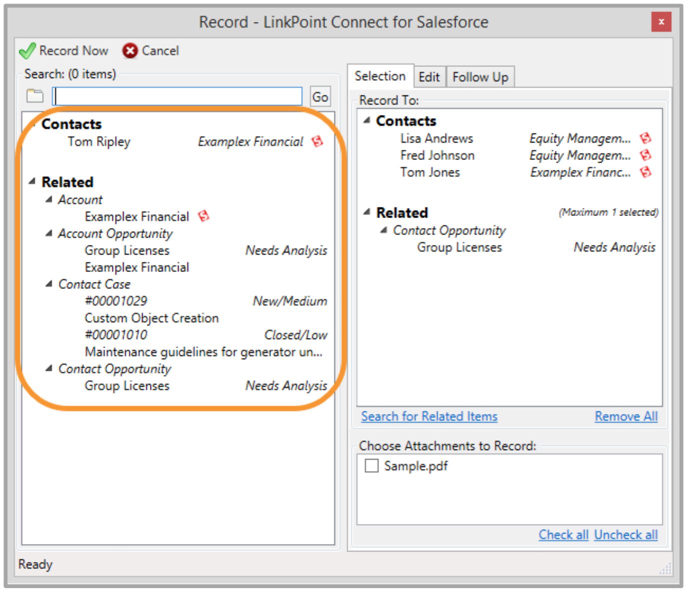


5 Mouse over an item in the **Record To** list and click the **red x** icon to remove it from the list. Note that the removed item will appear on the left side of the Record window.



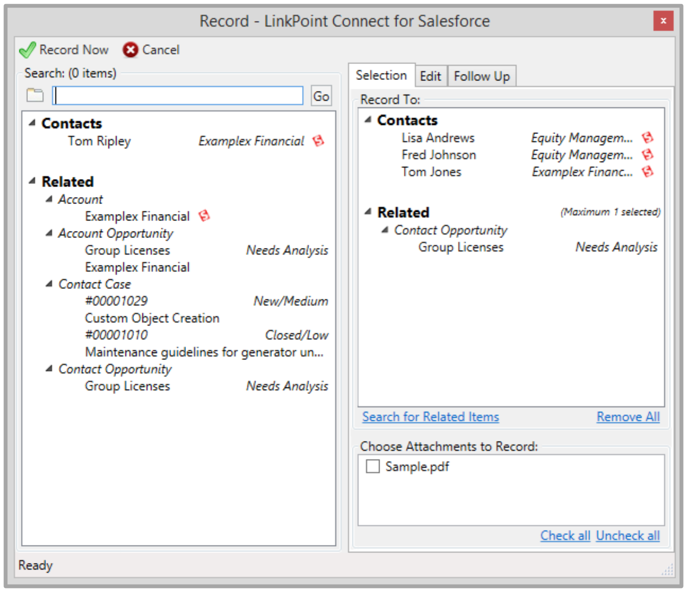
Tip: You can also double click on an item to add or remove it from the Record To section.

6 Select additional items to record the email to from the **Related** list on the left side of the **Record** window.



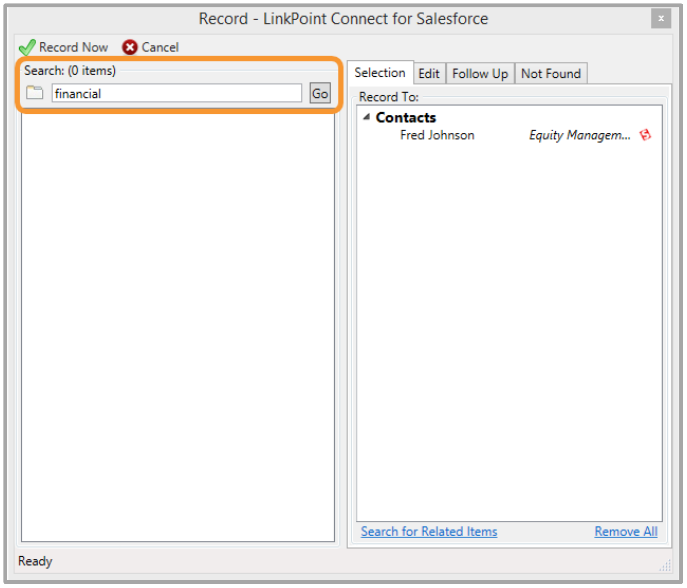
Warning: Salesforce does not allow users to take action on more than one related record type, such as Opportunity or Case, at the same time. Try selecting only Opportunity or only Case items and record the email.

7 Enter text in the search field and click **Go** to search for additional records. Review the search results list, mouse over an item, and click the **green arrow** to add the contact to the **Record To** list.

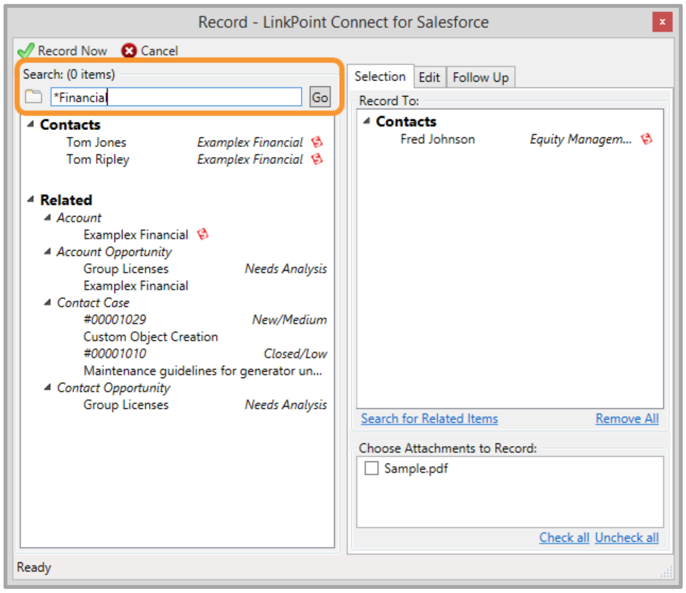


Tip: By default, LinkPoint Connect is configured to search based on *Starts with* logic in the Record window. Users can add either ***** or **%** at the start of the search term to perform a *Contains* search.

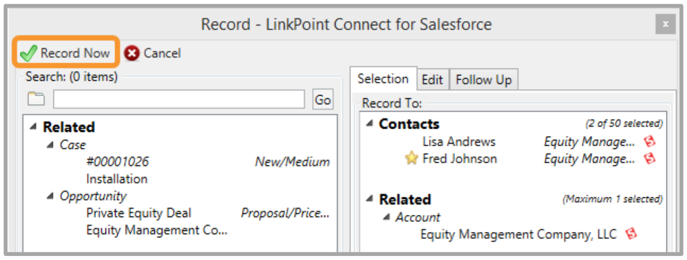
Example: In this example, we want to record an email to an account record. We search for the record using the word *Financial* because we remember the name of the account has the word *Financial* in it. However, the account does not appear in the results because *Financial* is not the first word of the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



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



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

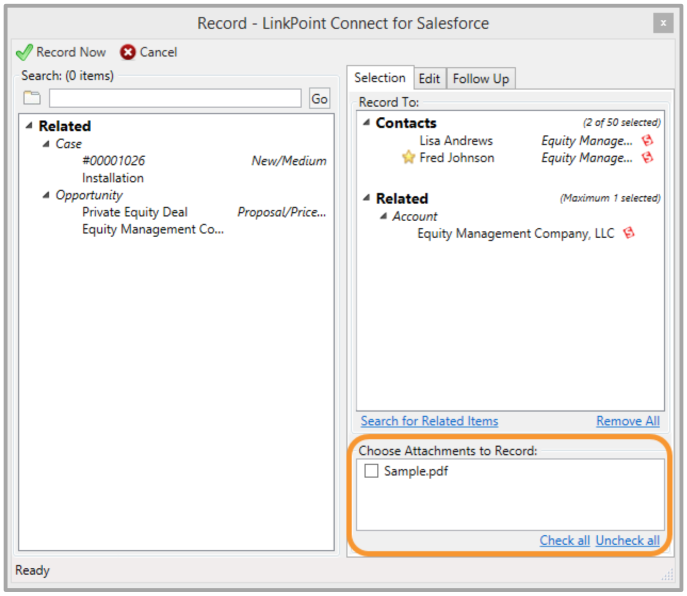


Recording Attachments to Salesforce from IBM Notes

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

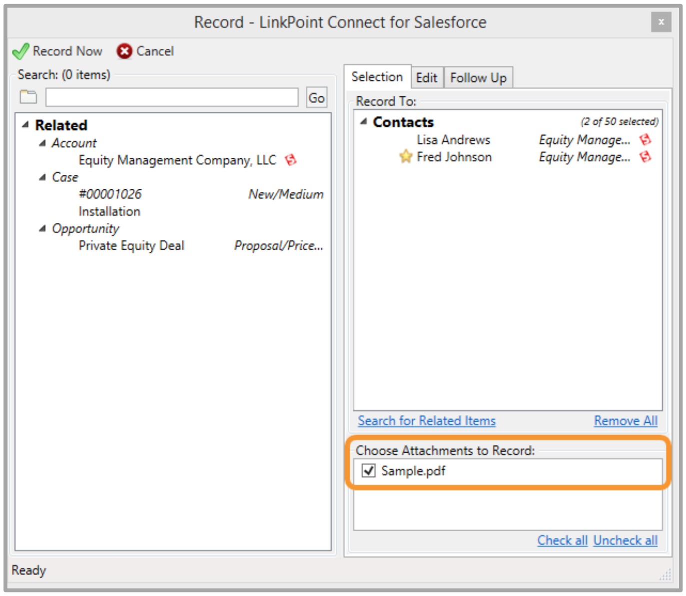
Tip: Recording attachments works the same for both inbound and outbound emails. However, note that attachments are not recorded when using the **Quick Record the email to this record** icon on the Side Panel.

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



2

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

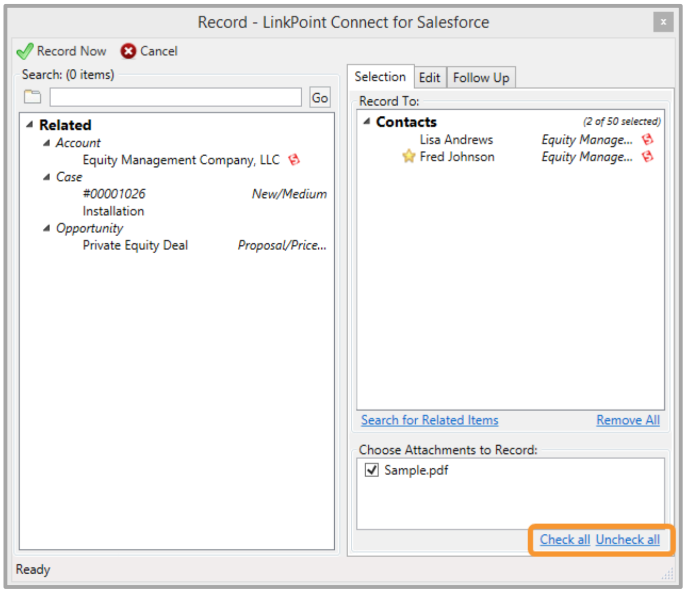


Tip: Attachments are listed but deselected by default in LinkPoint Connect. This gives users the ability to control the items that are recorded to Salesforce. Many emails contain graphics, such as social media icons in email signatures, that do not need to be recorded to Salesforce.

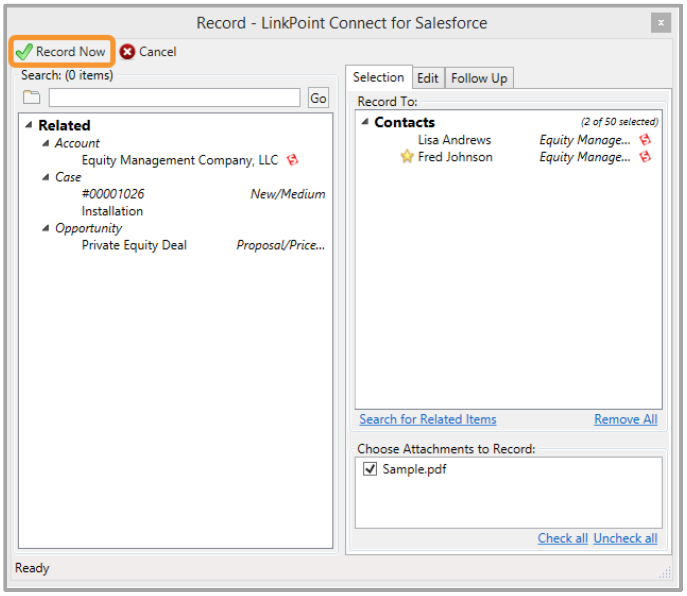
Additional Resource: Refer to the **Configuring LinkPoint Connect Record Functionality** section of this User Guide for more information on configuring default attachment record settings.

3

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



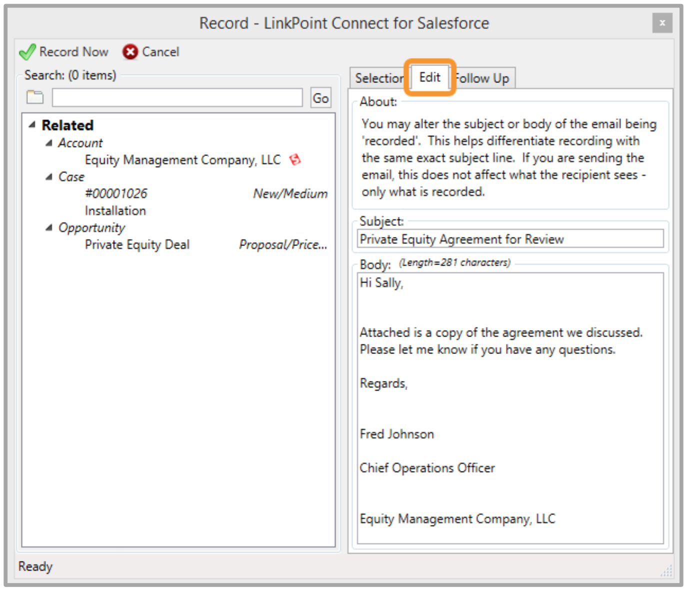
4 Click the **Record Now** button to record and send the email, or continue on to the next section in this User Guide.



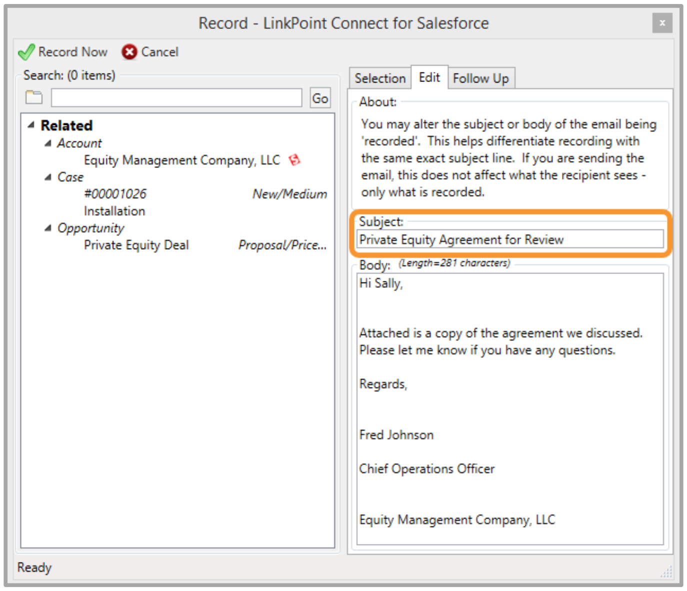
Editing Email Content When Recording to Salesforce from IBM Notes

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

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

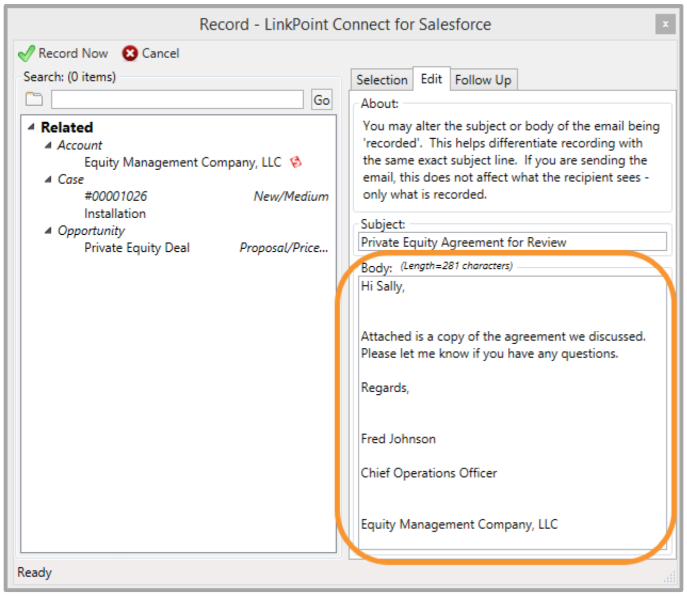


2 Enter or edit the text in the **Subject:** field.



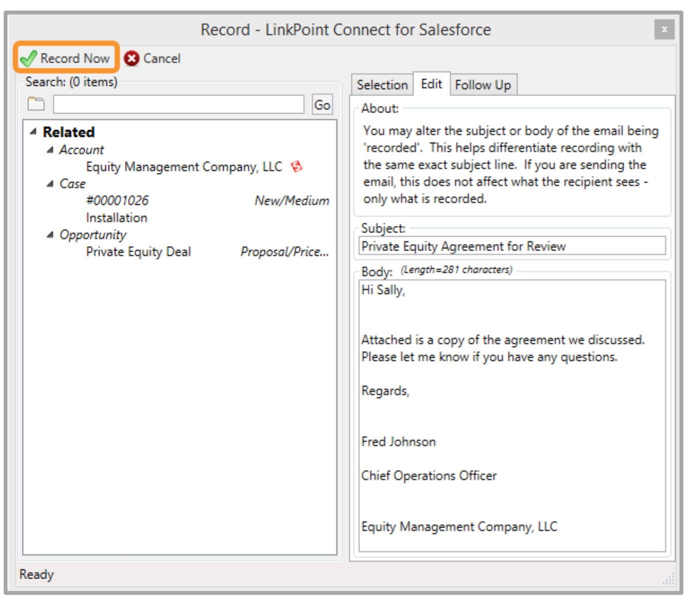
Tip: This field automatically populates with the existing subject of the email. Users can alter the subject of the email to change how it will appear within Salesforce to help differentiate it from other recorded emails with the same subject line.

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



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

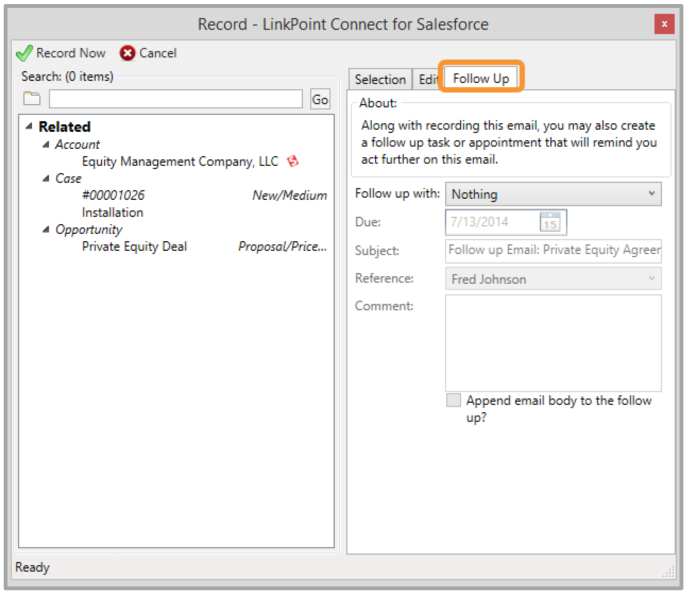
4 Click the **Record Now** button to record and send the email, or continue on to the next section in this User Guide.



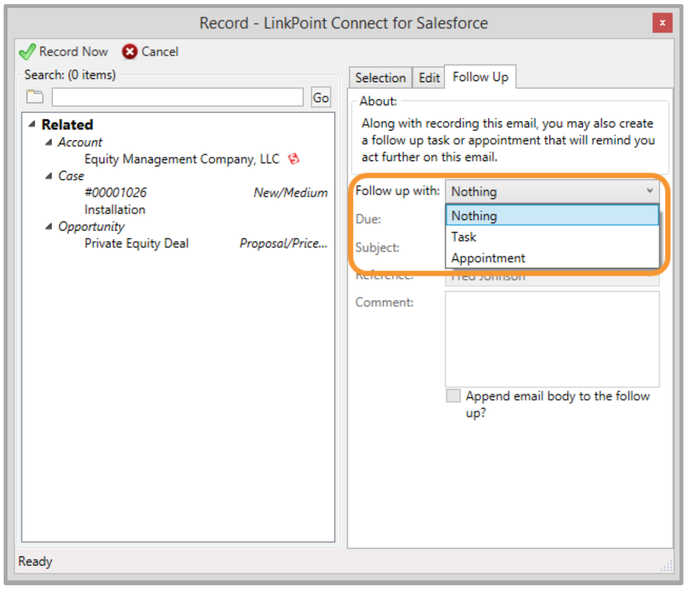
Scheduling Follow Up Actions When Recording an Email

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

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



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

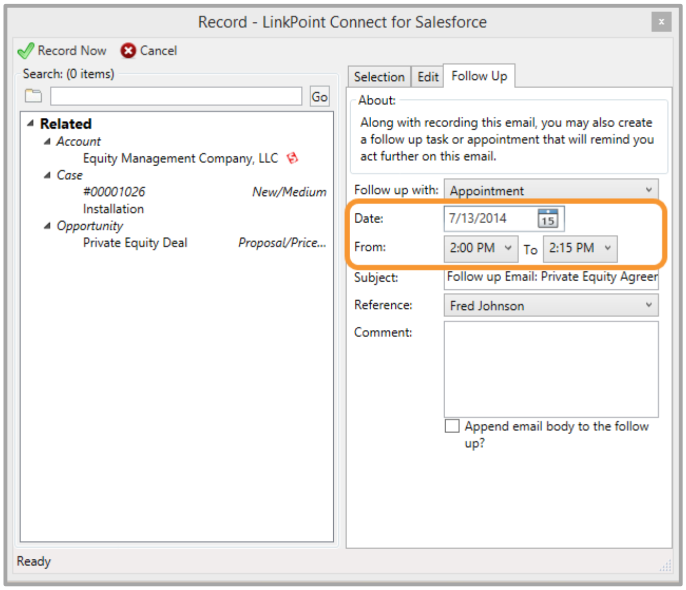


Example: In this example, we will schedule a follow up Appointment. The process is similar for scheduling Tasks. Appointments are typically chosen if the action includes other participants. Tasks are typically chosen if the action is to be completed by a single individual.

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

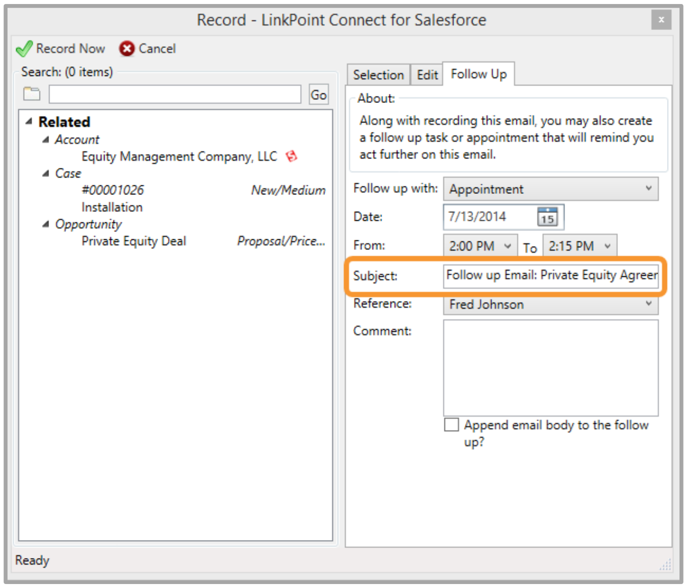
Additional Resource: Refer to the **Configuring LinkPoint Connect Record Functionality** section of this User Guide for more information on configuring default follow up settings.

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



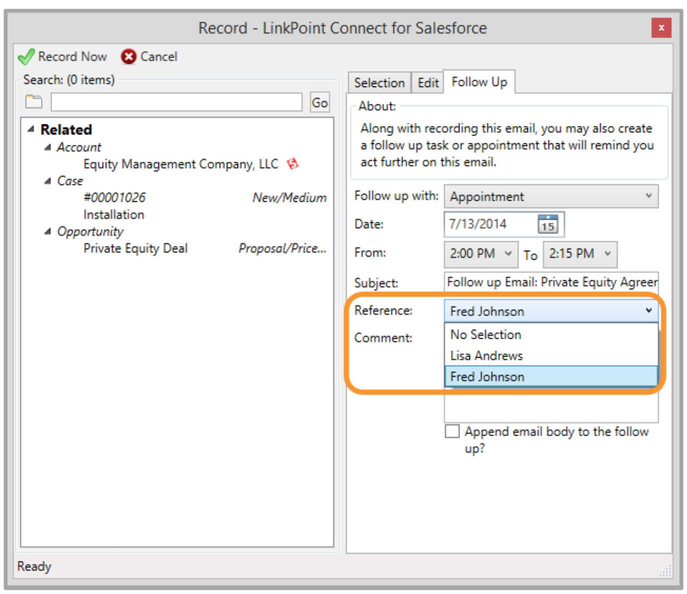
4

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



5

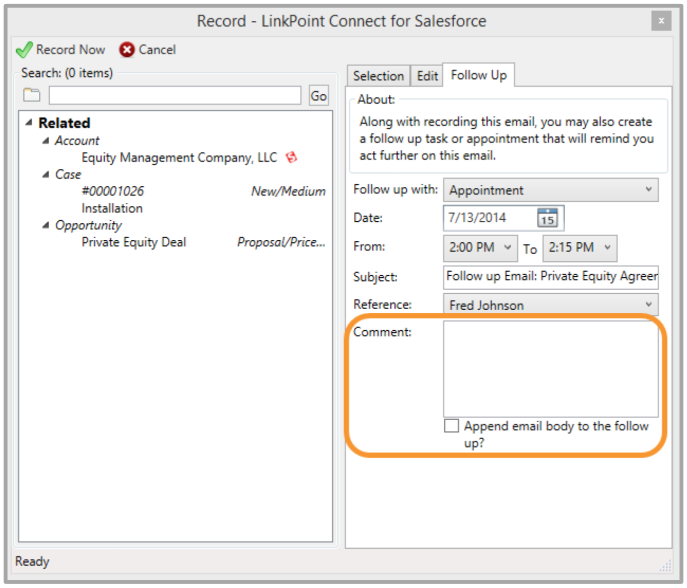
Select the contact to associate the Appointment with from the **Reference** drop-down list. This list will include any related contacts that were added to the Selection tab within the Record window.



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

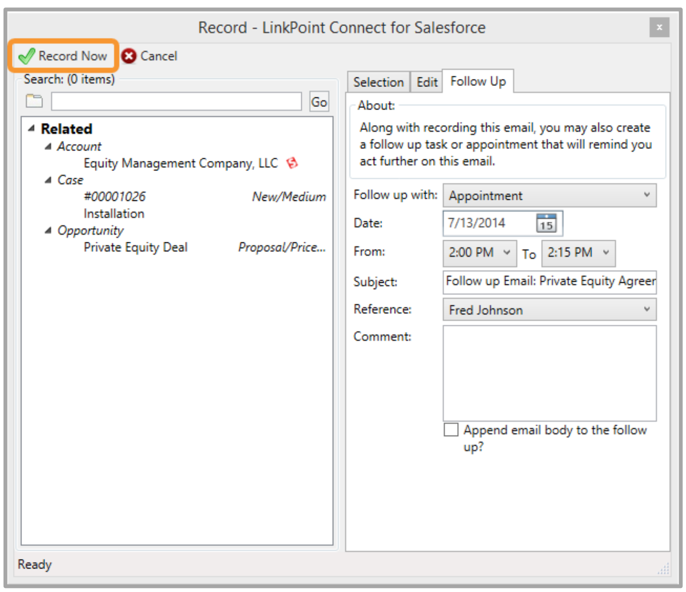
6

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



7

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

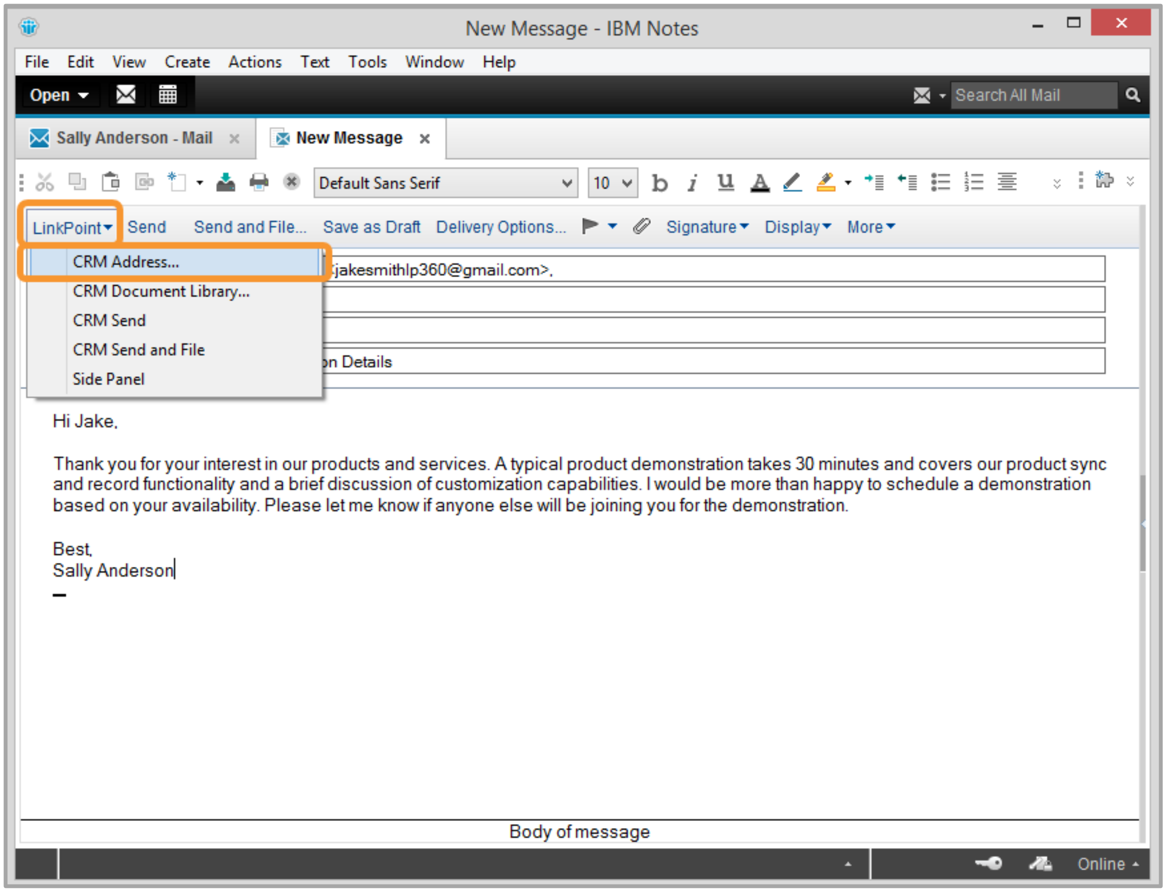


Tip: The newly created follow up item (i.e. Appointment or Task) is created within Salesforce and saved to your Salesforce calendar as part of the Record process. Depending on your LinkPoint Connect Sync settings, the Salesforce calendar item will sync with your IBM Notes calendar.

Adding Salesforce Contacts as Email Recipients in IBM Notes

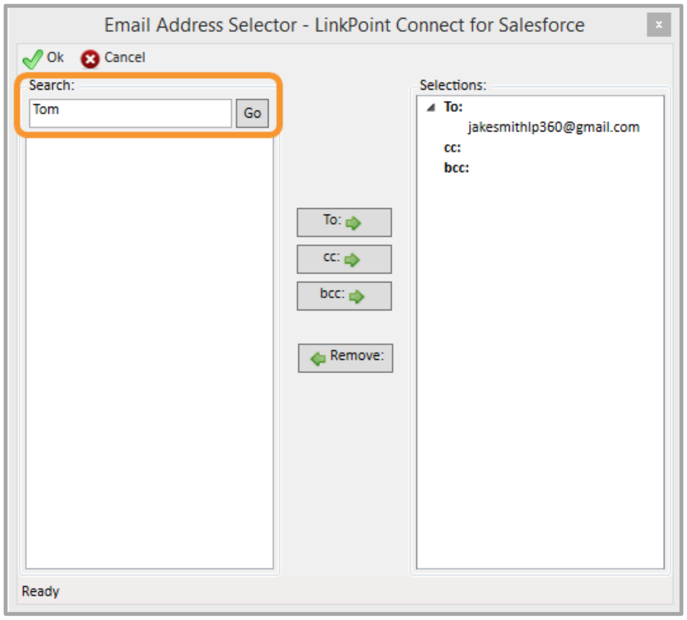
LinkPoint Connect provides unique functionality that gives users access to use their Salesforce data without leaving IBM Notes. When creating a new email, sending a reply, or forwarding communication, users can easily access their existing Salesforce contacts directly within IBM Notes to include additional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

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



2

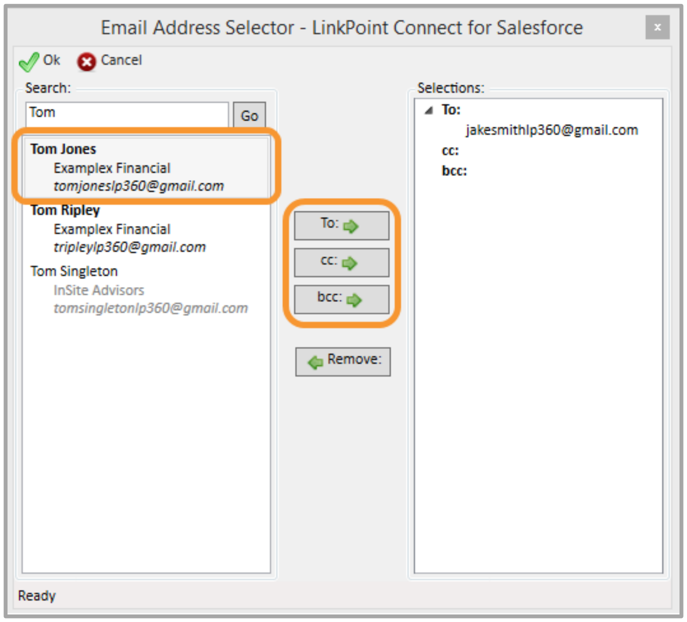
Search for Salesforce contacts by entering a full or partial contact name, account name, or email address in the **Search** field and click the **Go** button.



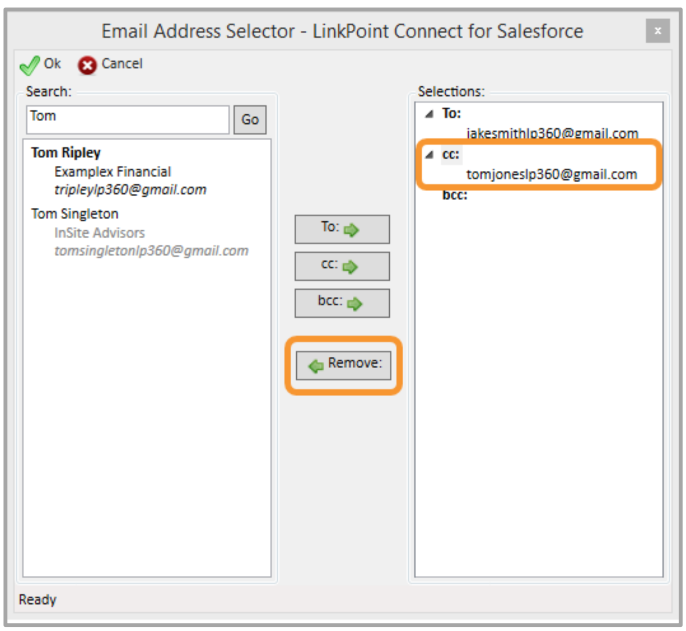
Tip: Any contacts already included in the To, Cc, or Bcc fields of the email will automatically appear within the Selections pane of the Email Address Selector window.

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

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



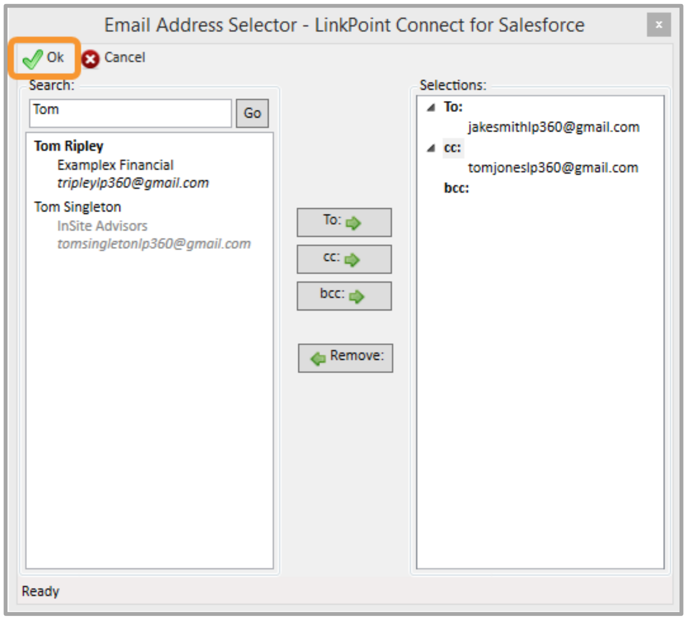
4 Select a contact in the Selections pane and click the **Remove** button to remove them from the recipient list.



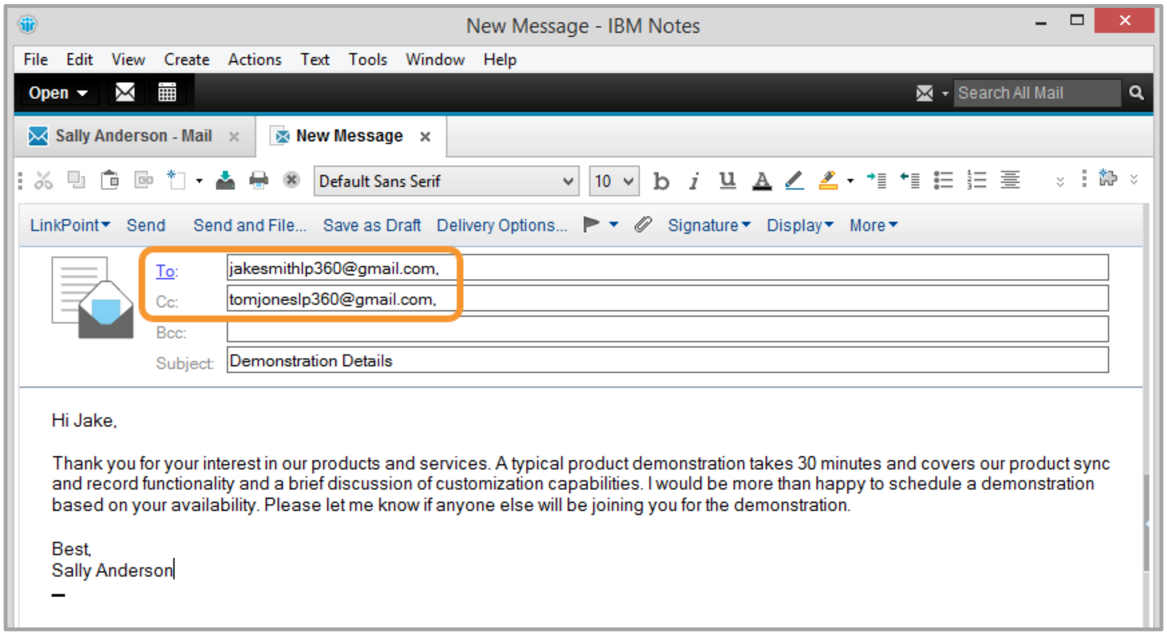
Tip: Double click a contact in either the Search or Selection pane to quickly move it from one side to the other. Double clicking a search item will add it as a To: contact in the Selection pane.

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

6 Click the **Ok** button to confirm the Selections.



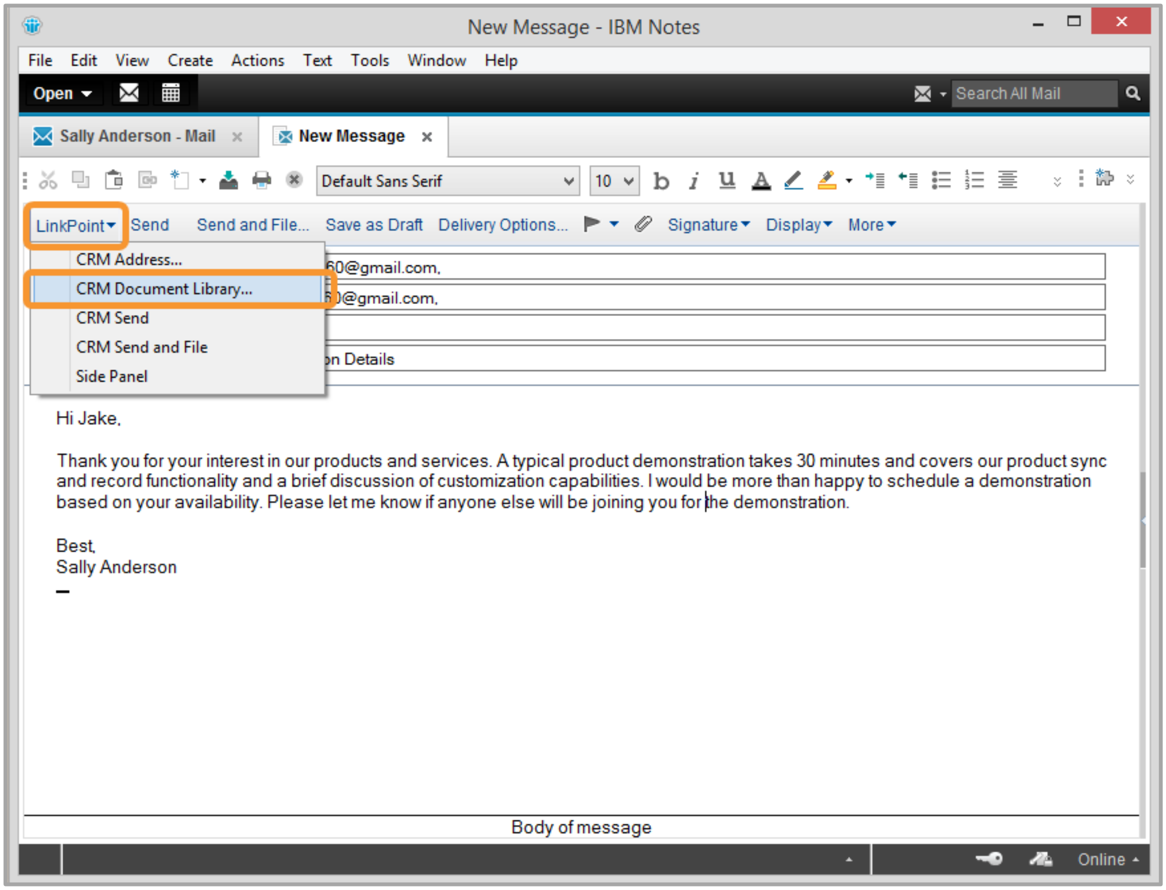
7 Note that the selections have been added to the corresponding fields within the outbound email. Finalize and send the email as you normally would.



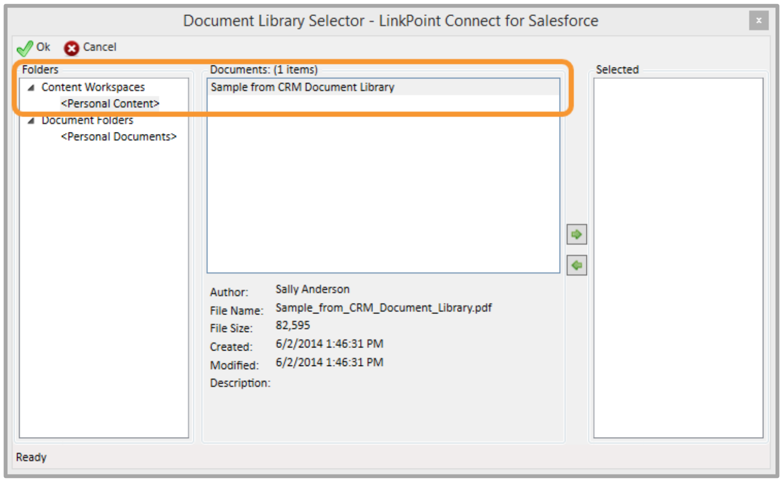
Attaching Salesforce Documents to Outbound Emails in IBM Notes

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 Salesforce 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 Salesforce Document Library and attach items to outbound emails from within IBM Notes.

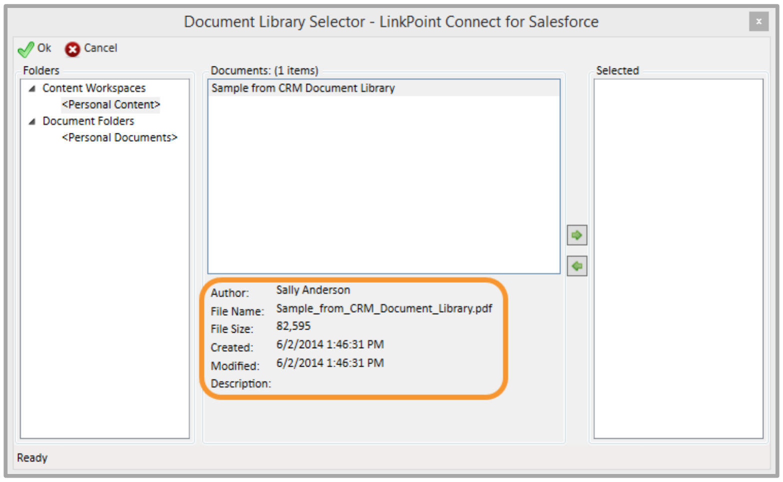
1 Open an outgoing email (either a new or existing email). Select **LinkPoint** from the toolbar, and then select **CRM Document Library…**from the drop-down menu.



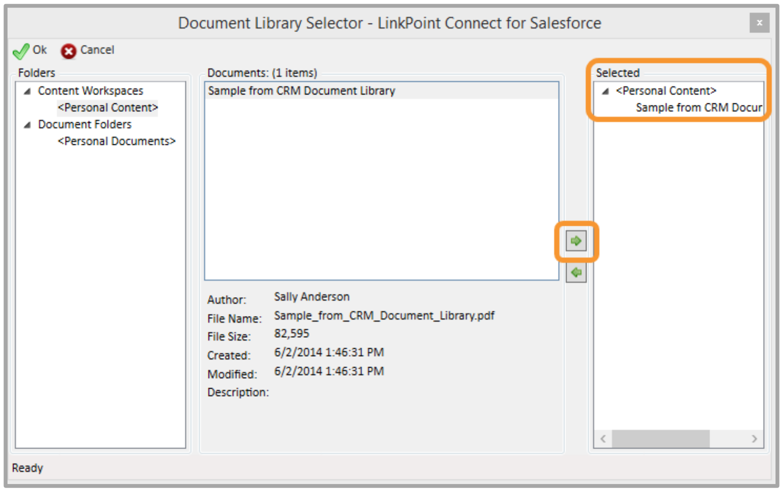
2 Select the Salesforce **Folder** that contains the document and view a list of available items in the **Documents** list. In some cases, you may need to click to expand nested folders.



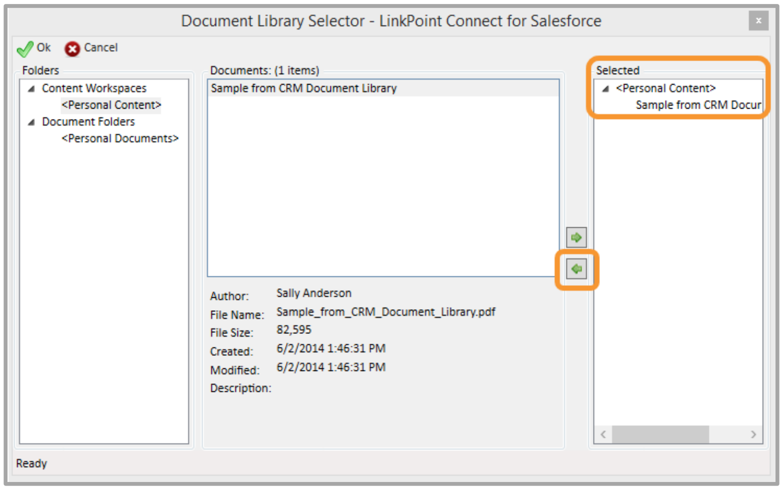
Tip: Note that the document information is displayed below the Documents pane.



3 Select an item in the **Documents** pane and click the right arrow to add the item to the **Selected** pane.

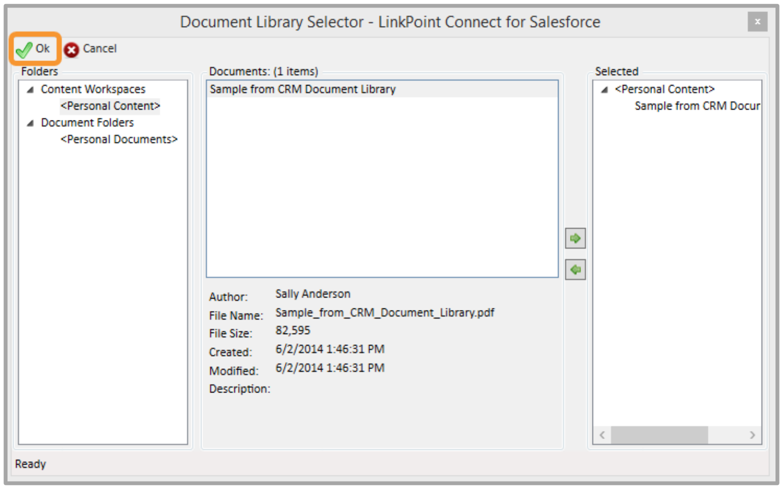


4 Select an item in the **Selected** list and click the left arrow to remove the item from the Selected pane.



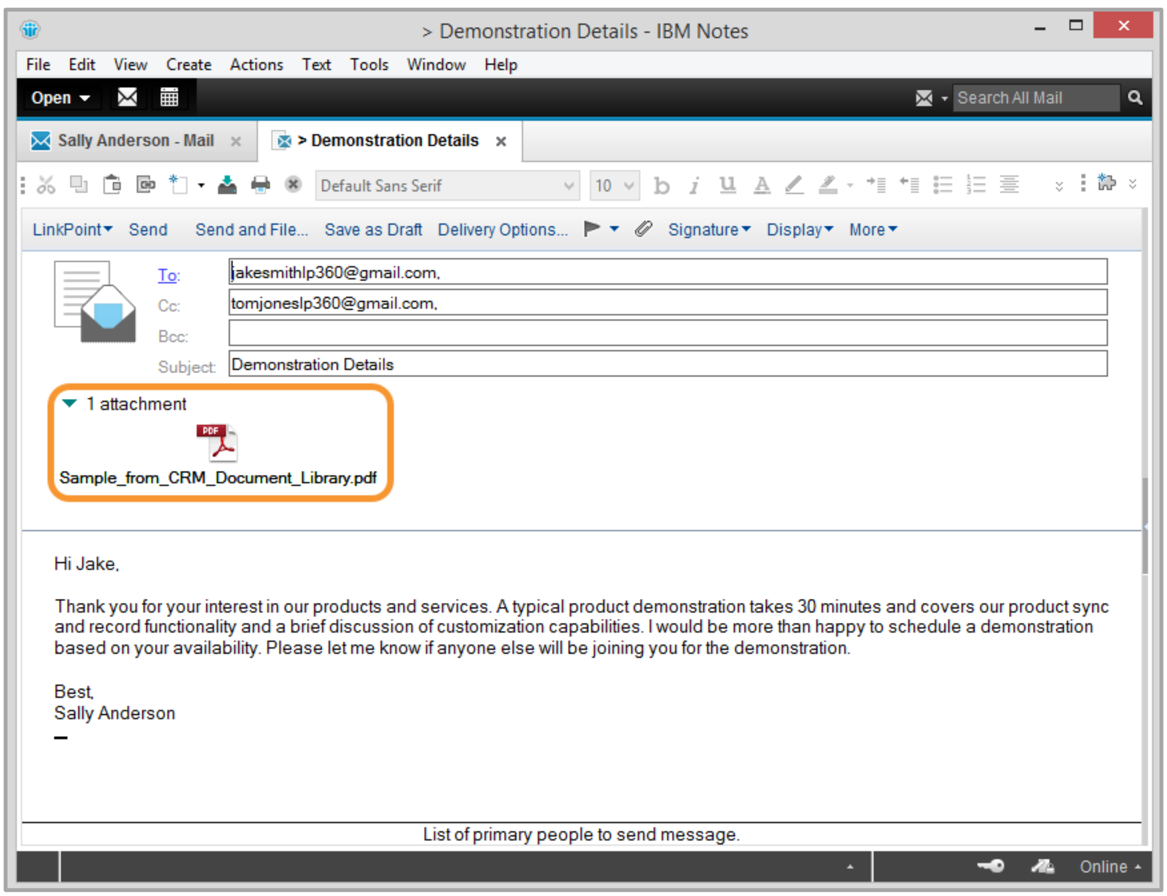
5

Click **OK** to proceed.



6

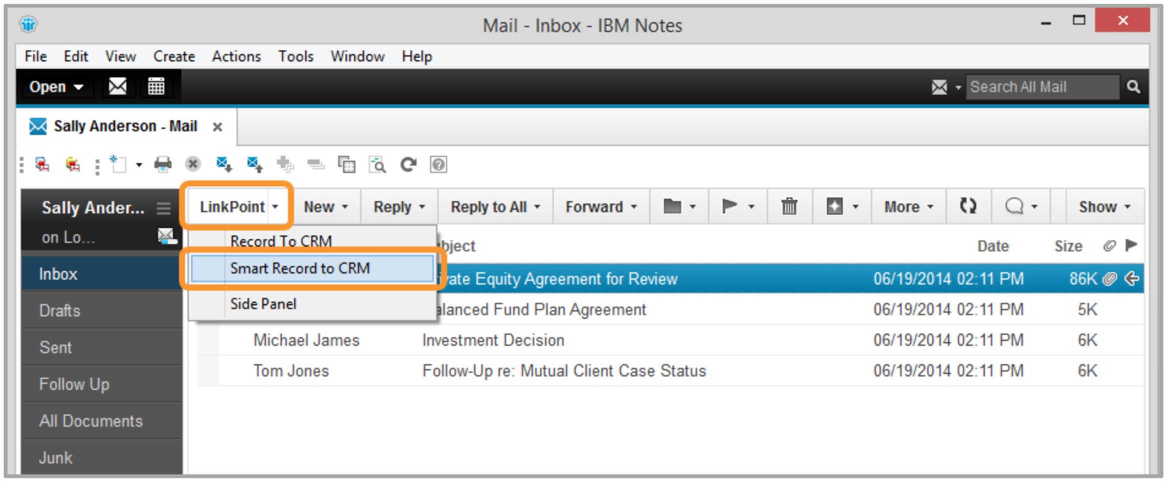
Note that the document from the Salesforce Document Library is now attached to the email. Finalize and send the email as you normally would.



Recording Emails to Salesforce with Smart Record and Smart Send

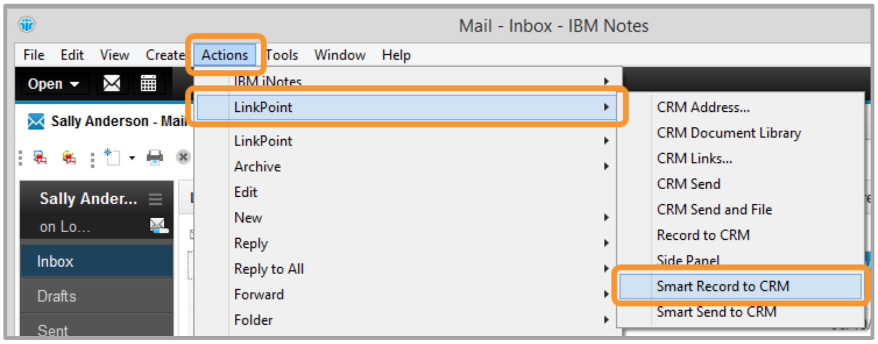
The Smart Record to Salesforce and Smart Send to Salesforce buttons offer a quicker way of recording emails to related contacts in Salesforce. LinkPoint Connect checks behind the scenes to identify contacts that match between the email recipient fields (To:, Cc:, and Bcc:) and Salesforce contacts. The 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 Salesforce button as usual. In this section, you will learn how to use Smart Send and Smart Record.

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

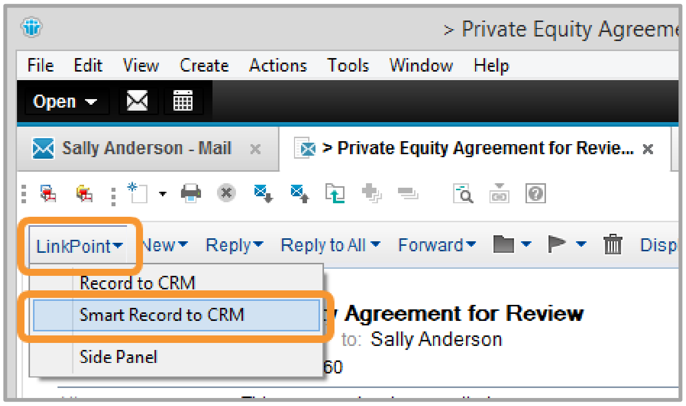


Tip: There are three other ways to access the Smart Record functionality for LinkPoint Connect. These options may vary depending on how your organization has installed LinkPoint Connect.

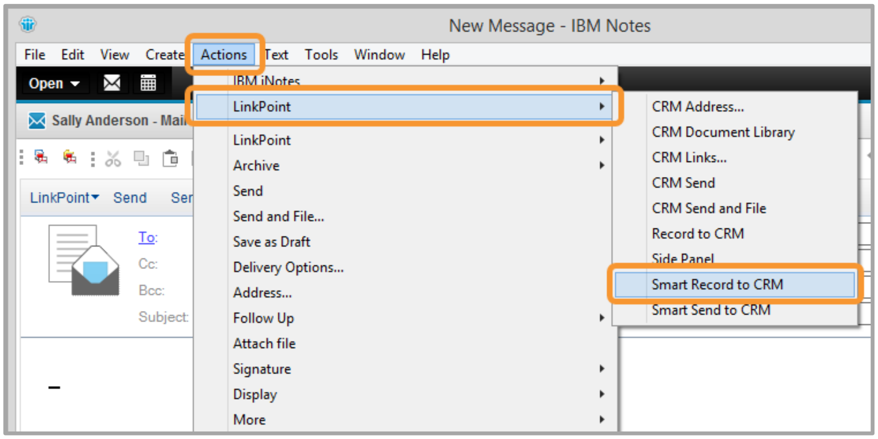
1. Select **Actions** from the main menu, select **LinkPoint** from the drop-down menu, and then select **Smart Record to CRM** from the list.



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



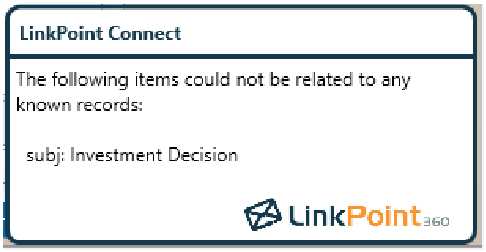
3. Create an outbound email. Select **LinkPoint** on the toolbar and select **Smart Record to CRM**.



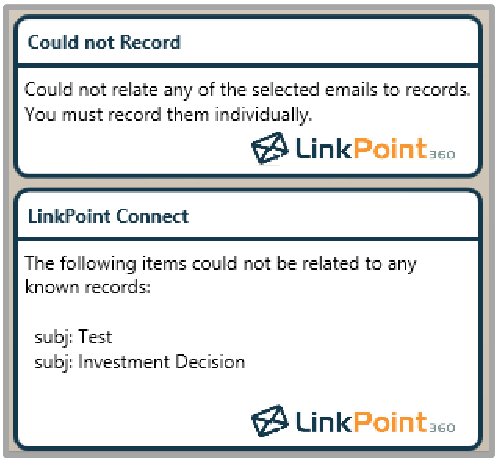
2 LinkPoint Connect will run a background search to determine whether any of the email recipients or senders match Contact records in Salesforce. The email will be recorded to all matching Salesforce contact records automatically. A pop-up notification will confirm that the email has been recorded.

3

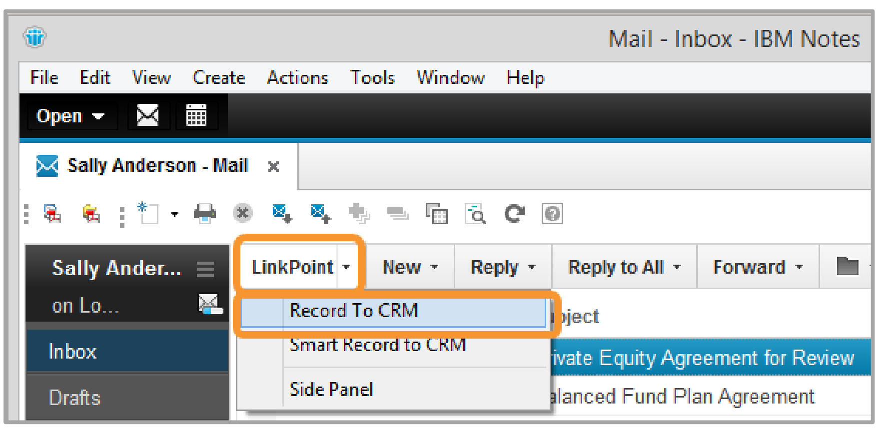
LinkPoint Connect will identify any emails that include contacts for which there is no match in Salesforce. A pop-up notification will indicate the email that was not recorded, and the Record window will launch to allow the user to record the email with options.



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



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



4

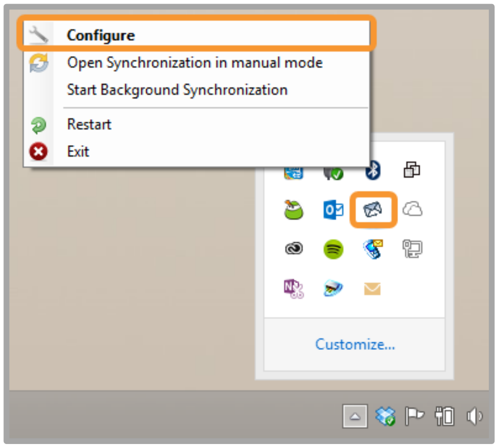
The **CRM** Category will be assigned to the email in Outlook once the email has been recorded to Salesforce.

Searching and Recording Based on Secondary Email Address

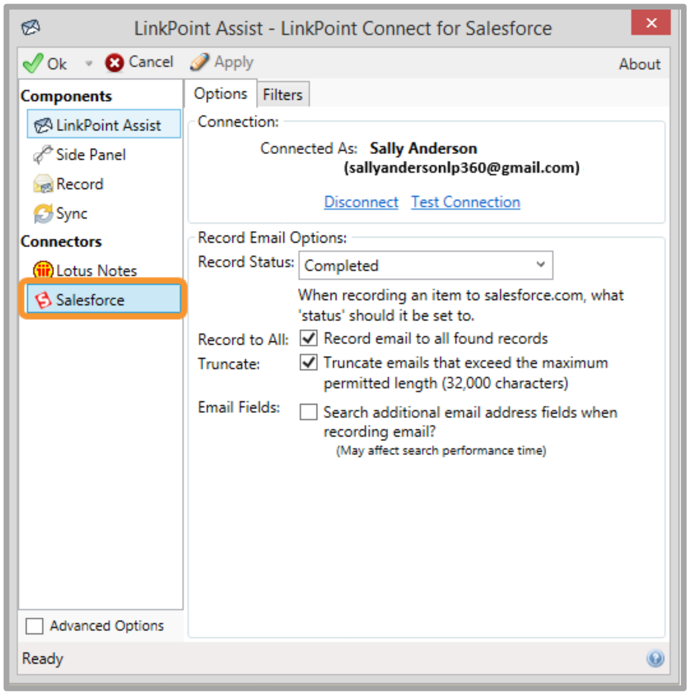
By default, LinkPoint Connect searches for matching Contacts and Leads within Salesforce based on primary email address in order to display matches in the Side Panel and Record window. But in many cases, a single contact may have multiple email addresses. If a user receives an email from an existing contact and LinkPoint Connect does not return a matching contact, it is possible that the contact may be in Salesforce under a secondary email address. Users can now enable secondary email address searching within LinkPoint Connect to make it easier to find contacts with several email addresses on file. In this section, you will learn how to enable and disable the setting that manages LinkPoint Connect email search fields.

Warning: Enabling the feature outlined in the following steps may affect search performance time. This feature is disabled by default.

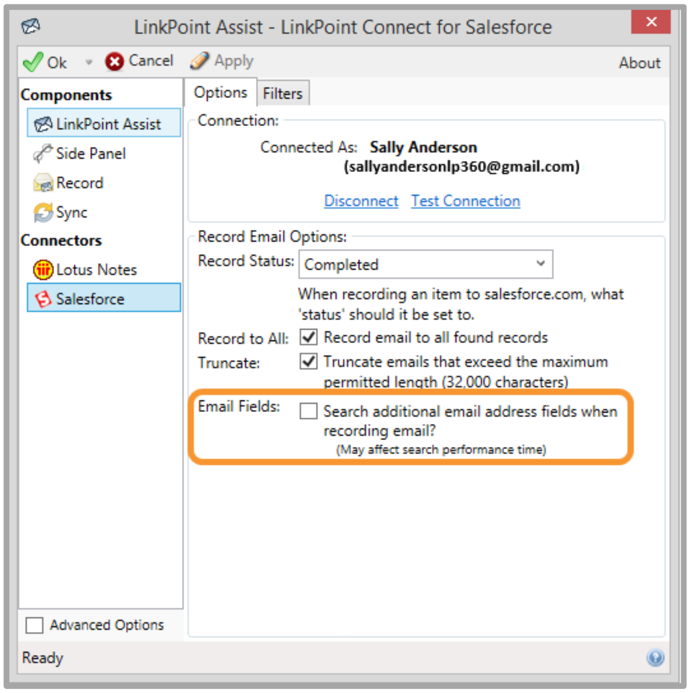
1. Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure**.



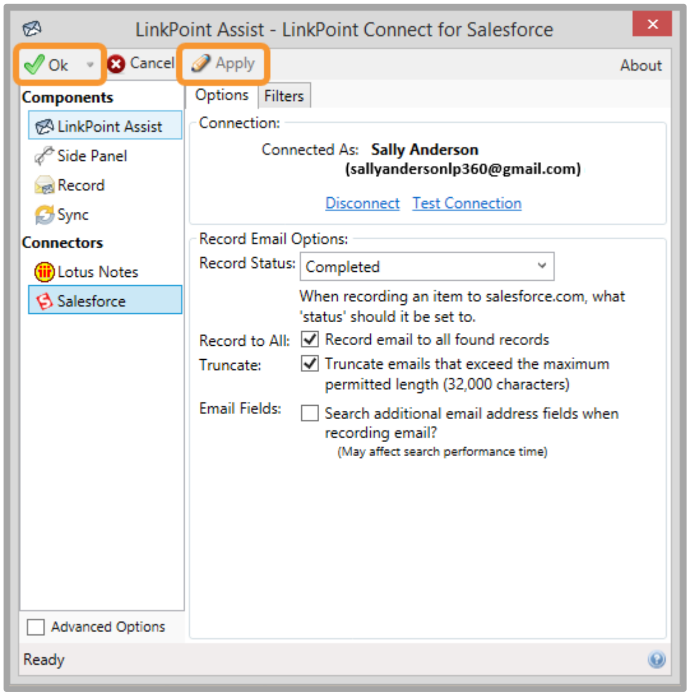
2 Select **Salesforce** from the **Connectors** list on the left side of the **LinkPoint Assist** window.



3 Select the checkbox for **Email Fields** to search additional email address fields when recording email or searching for contacts in the LinkPoint Connect Side Panel. Deselect the checkbox to disable the option.



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



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 Salesforce. 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 Salesforce 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 Salesforce 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 Salesforce with IBM Notes-based lead and client communication.

Functionality highlights include:

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

Manual Sync

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

Auto Sync

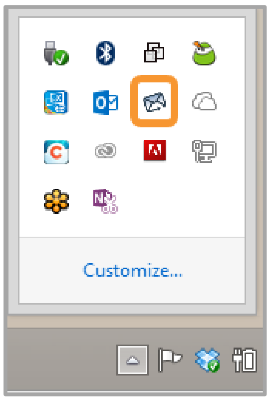
Users can set up their preferred synchronization options within LinkPoint Assist to use the Auto Sync feature. The configuration to automate when and how calendar, contact, and task items move between systems. These settings are highly configurable on a per user basis or can be configured the same way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

Configuring LinkPoint Connect Manual Sync Settings

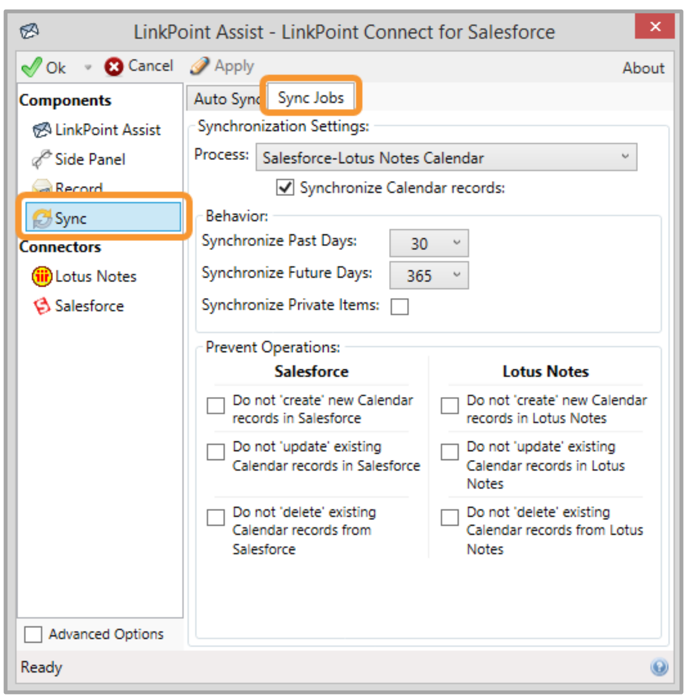
Before running a Manual Sync or scheduling an Auto Sync, it is important for users to become familiar with the available LinkPoint Connect sync settings. The synchronization of calendars, contacts, and tasks works similarly but can be managed separately based on user preference. Configuration settings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

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

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

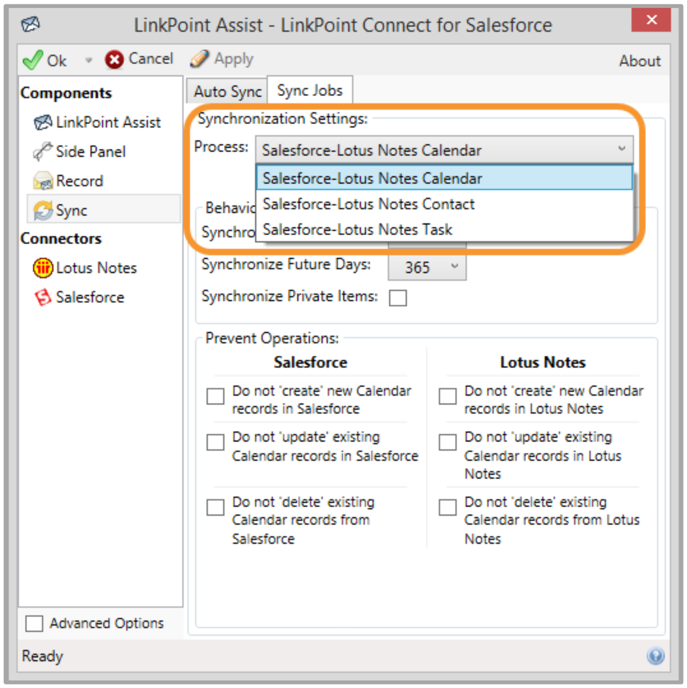


2. Select **Sync** from the **Components** list within the **LinkPoint Assist** window, and select the **Sync Jobs** tab.



3

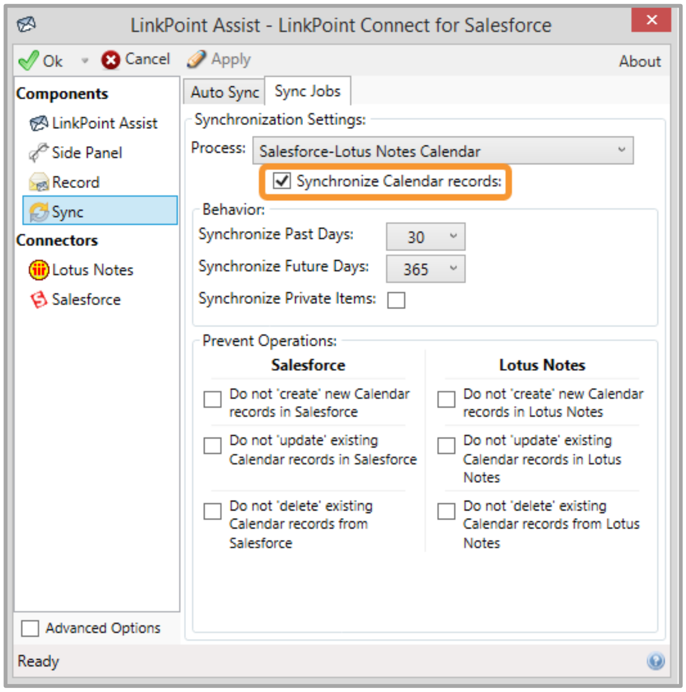
Select the **Process** to configure from the drop-down list. The options include Calendar, Contact, and Task.



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

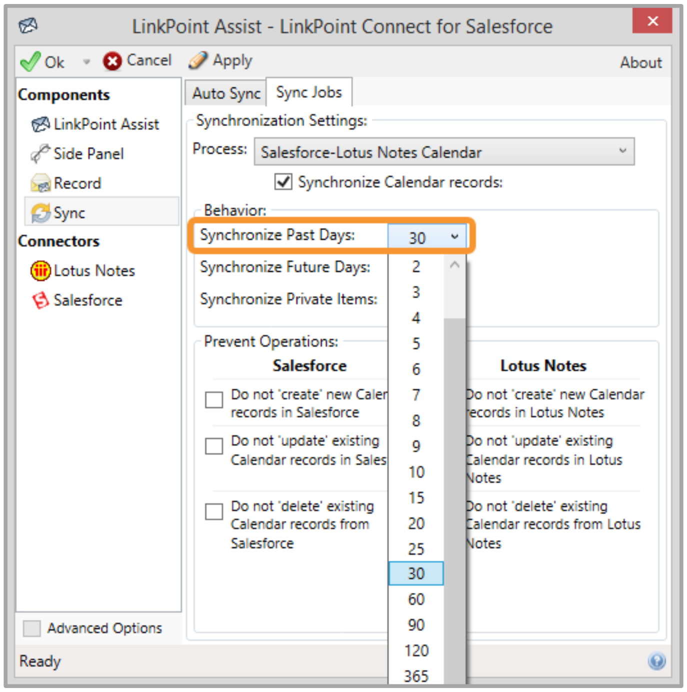
4

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

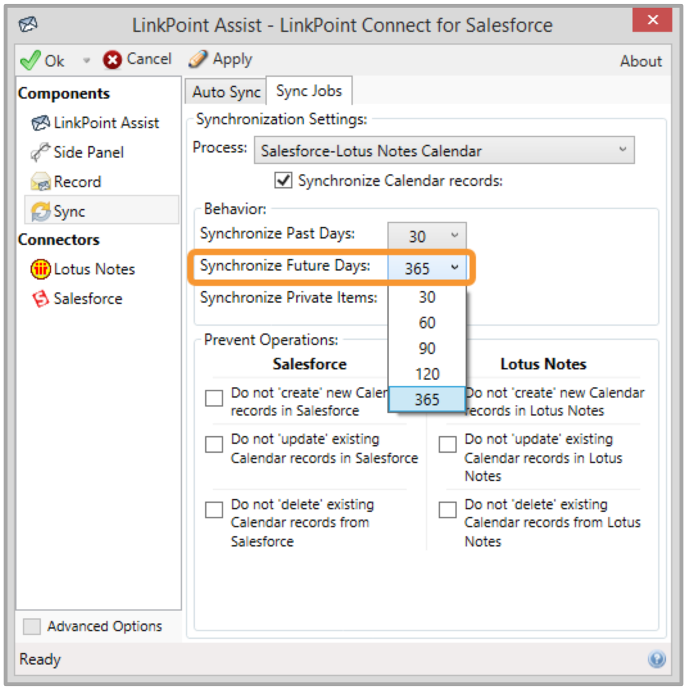


5

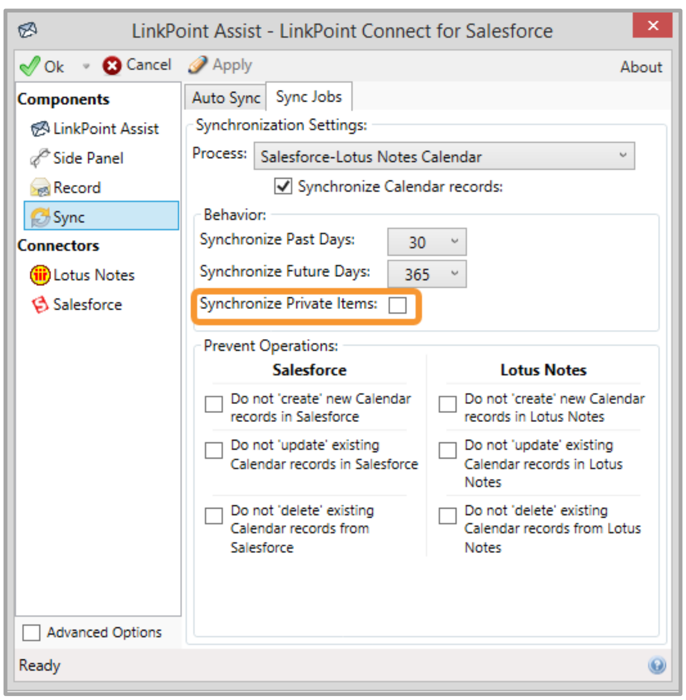
Select the number of days from the **Synchronize Past Days** drop-down list. This will determine how far back the sync will update or include information for dated items that occurred in the past.



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

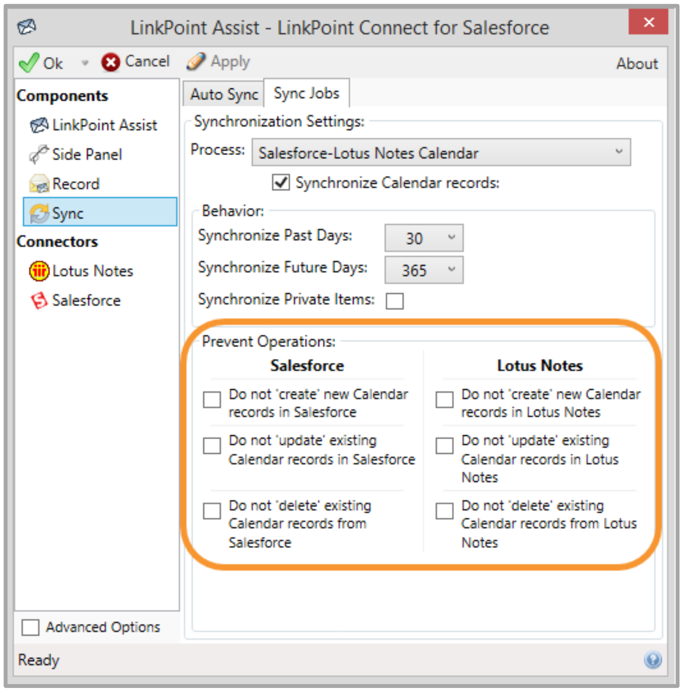


7 Deselect the **Synchronize Private Items** checkbox to ensure that Calendar items marked as Private are not included in the sync. Select the checkbox to send Private items between IBM Notes and Salesforce. Note that this option is deselected by default by LinkPoint Connect.



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

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

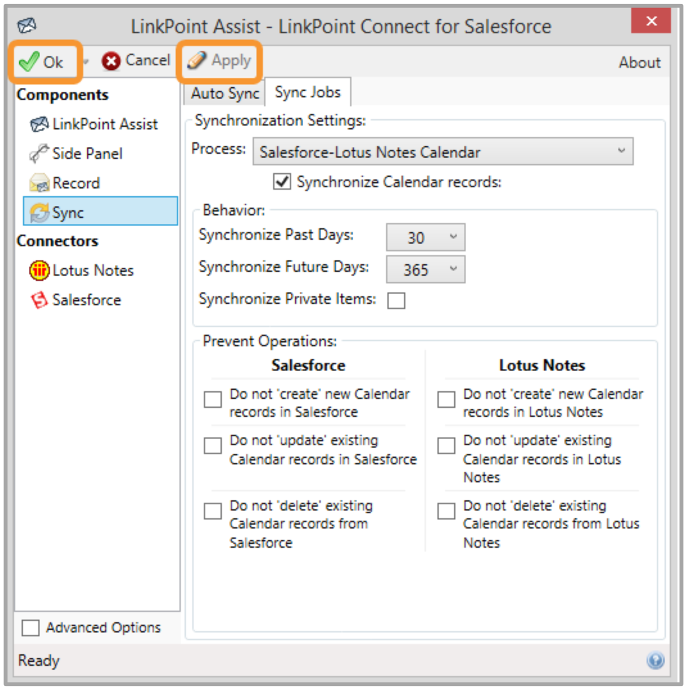


Tip: Users can prevent LinkPoint Connect from creating, updating, or deleting items regardless of any other system settings. Users can set this individually for IBM Notes and Salesforce, effectively creating bidirectional or one-way sync rules.

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

9

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

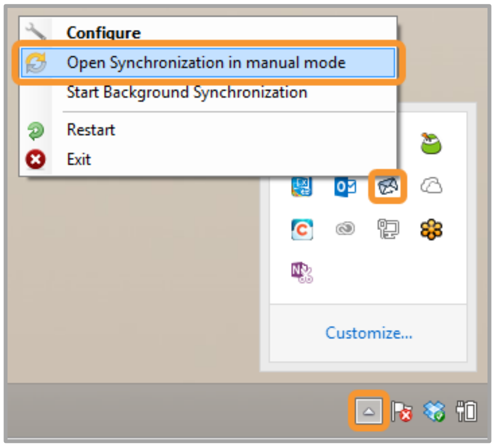


Syncing Calendar Items between IBM Notes and Salesforce with Manual Sync

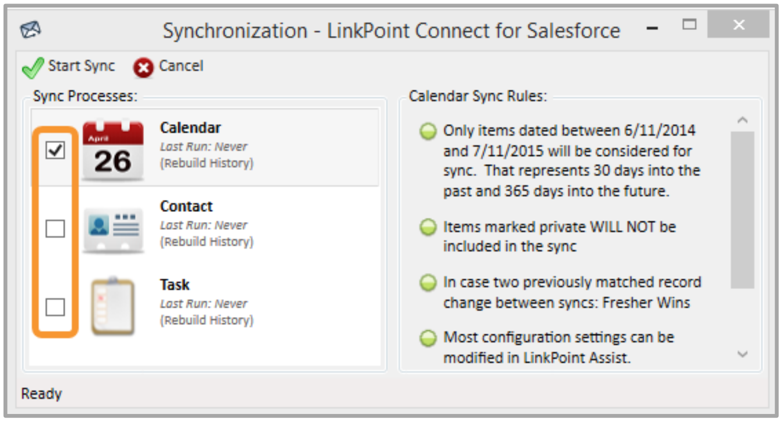
LinkPoint Connect offers users the flexibility to control when and how their calendar items are synchronized between IBM Notes and Salesforce with a Manual Sync feature. In this section, you will learn how to use Manual Sync to synchronize calendar items both to and from IBM Notes and Salesforce.

Tip: LinkPoint Connect will only sync one-to-one between an IBM Notes Calendar and Salesforce. This means that while you may have access to more than one IBM Notes Calendar (i.e. your calendar, a team or group calendar), you can only choose one calendar to sync with Salesforce. Note that if you choose to sync with a shared IBM Notes calendar, all items not marked as private will sync to your specific Salesforce calendar.

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

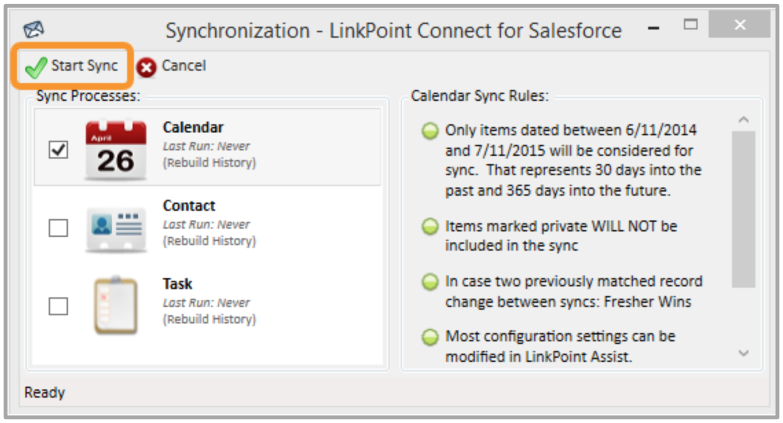


2. Select the **Calendar** checkbox. Deselect any other items you do not want to sync at this time.



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

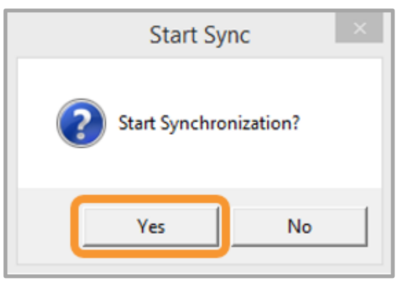
3 Click the **Start Sync** button to proceed.



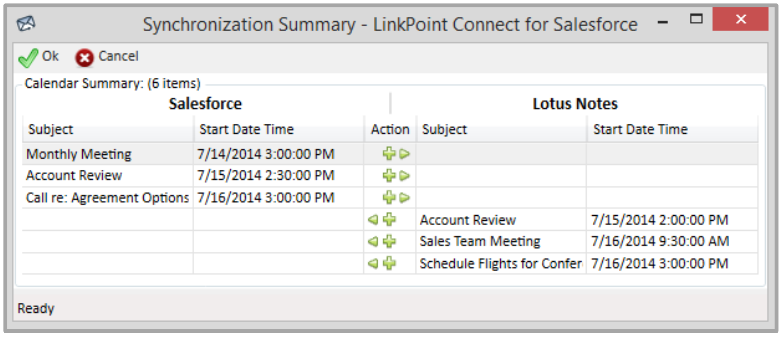
Tip: You will have a chance to review and confirm the items to be synchronized before the tool actually runs the synchronization process.

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

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



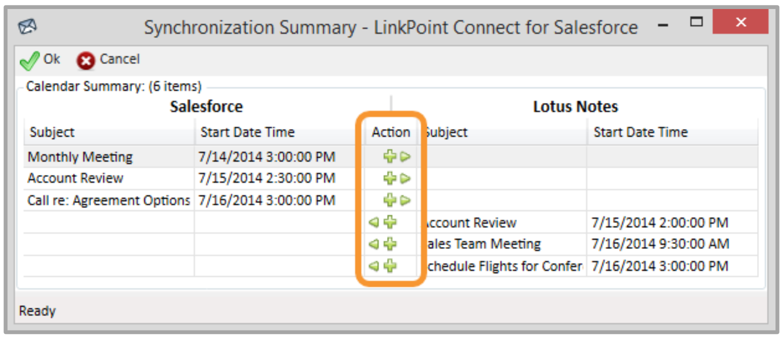
5 Review the **Synchronization Summary** window to see a list of all new or updated calendar items that match the established sync criteria. Items that exist in Salesforce appear on the left. Items that exist in IBM Notes appear on the right.



Tip: Note that the Calendar item will sync over to your Salesforce Calendar during the sync, but will not sync the meeting invite to each invitees/attendee record in Salesforce due to Salesforce restrictions. If you would like to view the list of invitees for Calendar items, the LinkPoint360 Professional Services team can configure LinkPoint Connect to include the invitee list within the meeting description when it is synced to Salesforce. When the item syncs back to Outlook, the invitee list is removed from the meeting description. Please contact your LinkPoint360 Account Executive for more information and assistance configuring this feature.

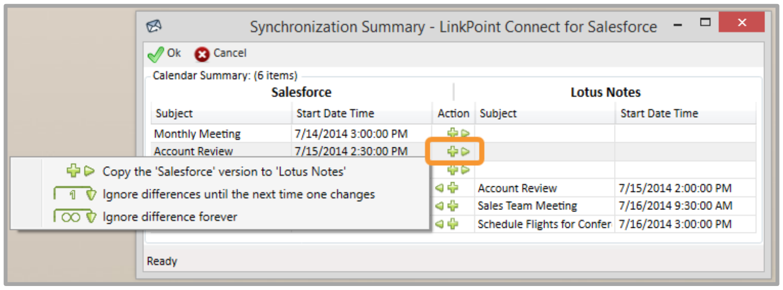
Tip: Attachments included with Calendar items do not sync to Salesforce as part of the sync process. You will be able to see the file names of the attachments that were included, but these attachments remain in Microsoft Outlook.

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



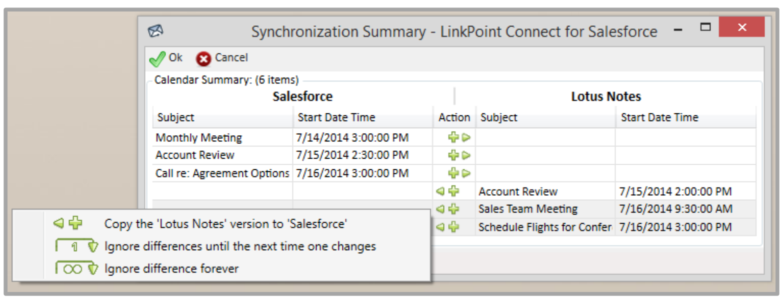
Icon	Action
	New Salesforce item will be added to IBM Notes
	New IBM Notes item will be added to Salesforce
	Updated Salesforce item will be updated in IBM Notes
	Updated IBM Notes item will be updated in Salesforce
	Deleted Salesforce item will be removed from IBM Notes
	Deleted IBM Notes item will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

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

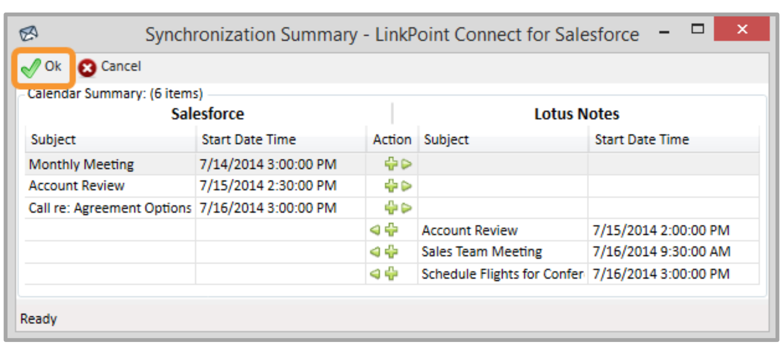


Tip: This is useful for excluding specific items from the sync for a single time or to exclude an item from the sync moving forward. Some users may have appointments that, while not marked as Private, do not need to be or should not be added to Salesforce or IBM Notes.

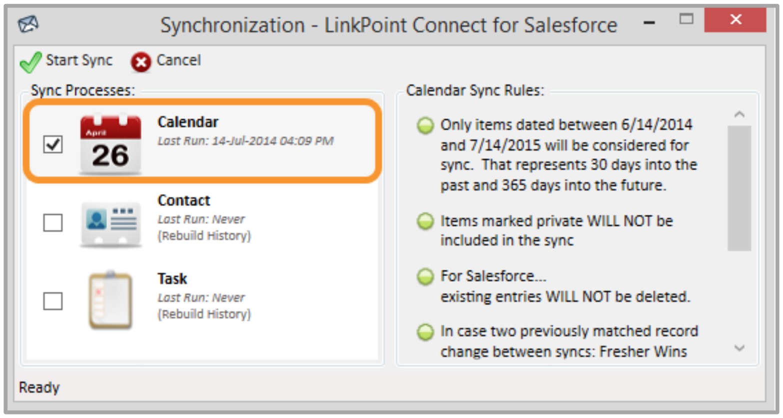
Tip: You can select multiple calendar items to apply changes by clicking the items with your mouse while holding the Shift key on your keyboard. Once the items are selected, right click to review the Action options.



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



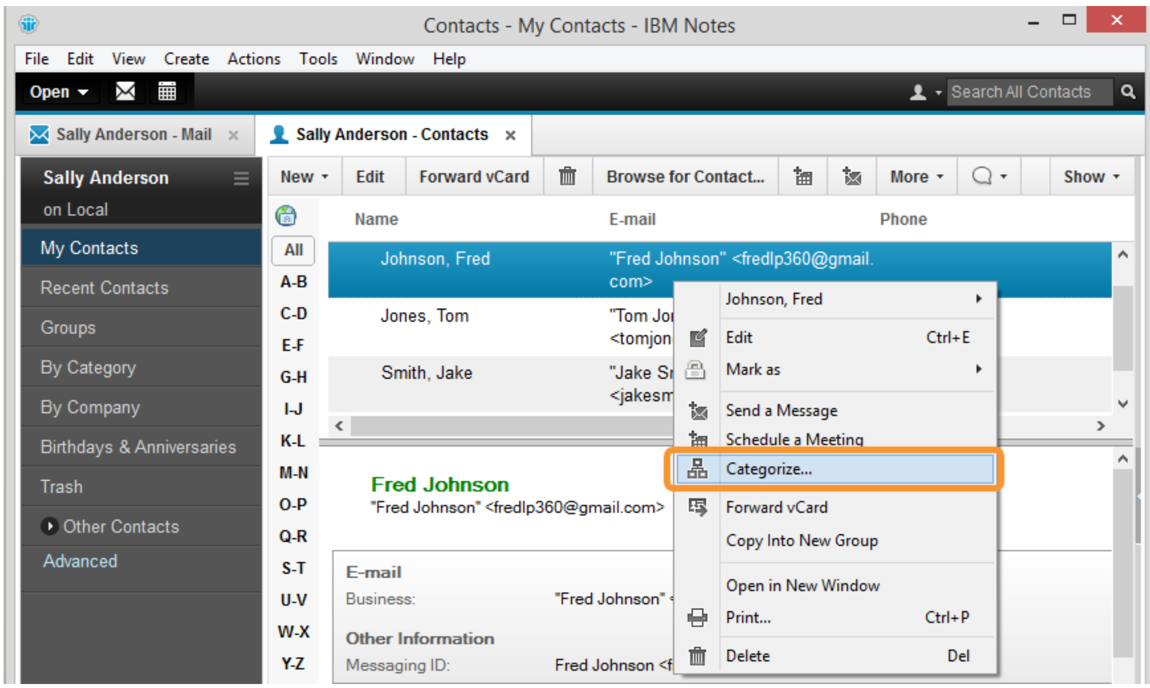
Tip: LinkPoint Connect will confirm the sync completion by updating the **Last Run** date and time in the Synchronization window.



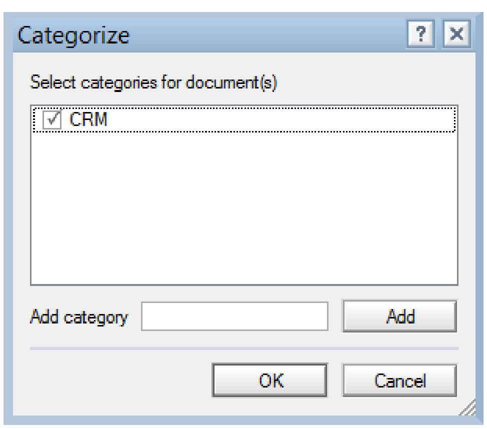
Syncing Contacts between IBM Notes and Salesforce with Manual Sync

LinkPoint Connect offers users the flexibility to control when and how their contacts are synchronized between IBM Notes and Salesforce 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 Salesforce.

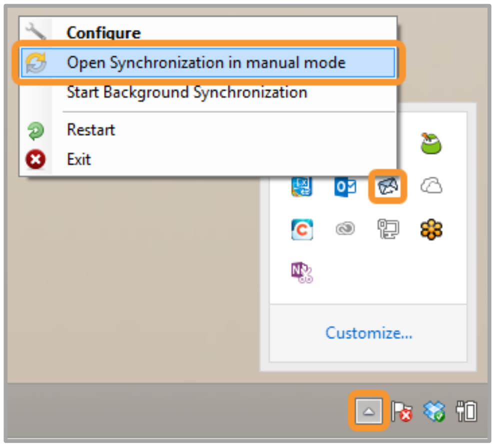
Tip: Before starting a Contact Sync, be sure that the IBM Notes contacts that you want to sync are assigned a Category of CRM. Select a contact, right click and select **Categorize**.



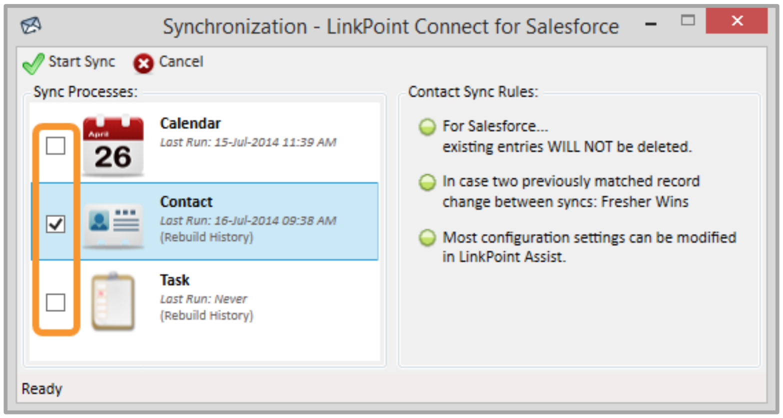
Select **CRM** category and then click **OK**. You may need to create the category first if you do not see it in the list of available options.



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

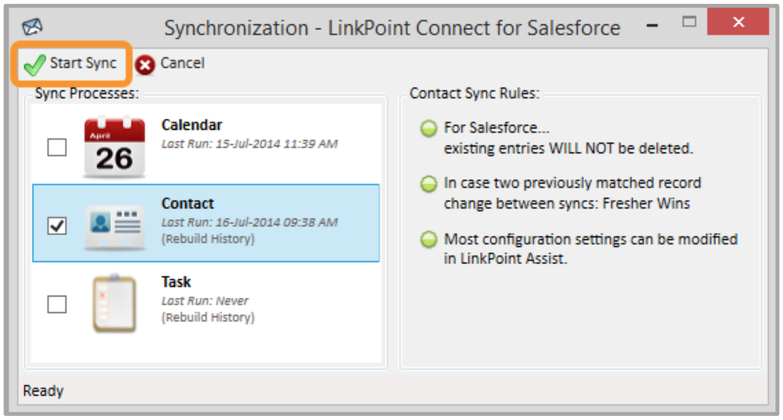


2 Select the **Contact** checkbox. Deselect any other items you do not want to sync at this time.



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

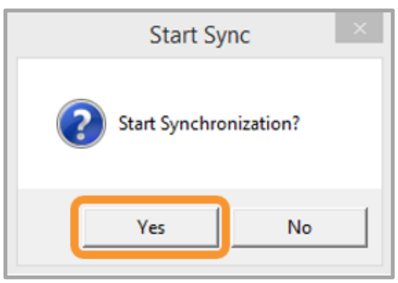
3 Click the **Start Sync** button to proceed.



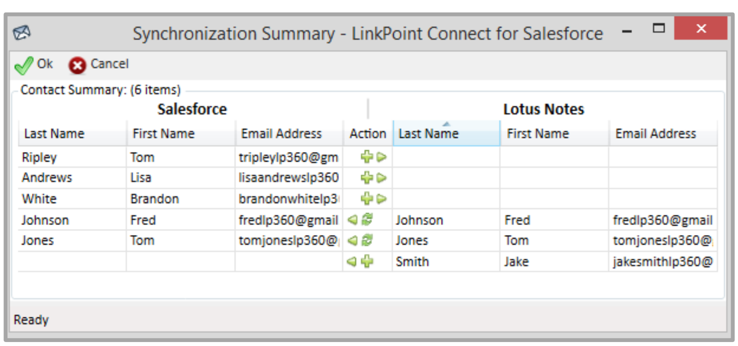
Tip: You will have a chance to review and confirm the items to be synchronized before the tool actually runs the synchronization process.

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

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

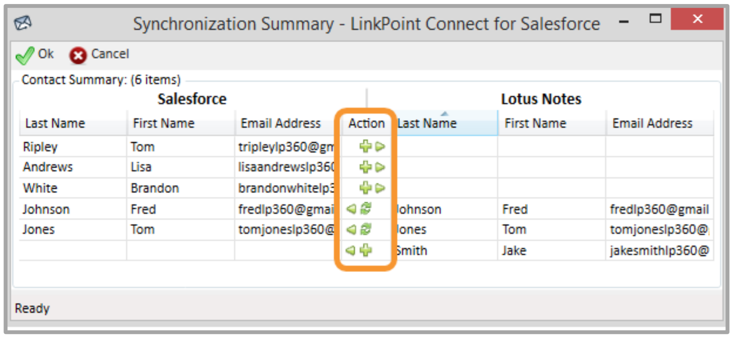


5 Review the **Synchronization Summary** window to see a list of all new or updated contacts that match the established sync criteria. Contacts that exist or were updated in Salesforce appear on the left. Contacts that exist or were updated in IBM Notes appear on the right.



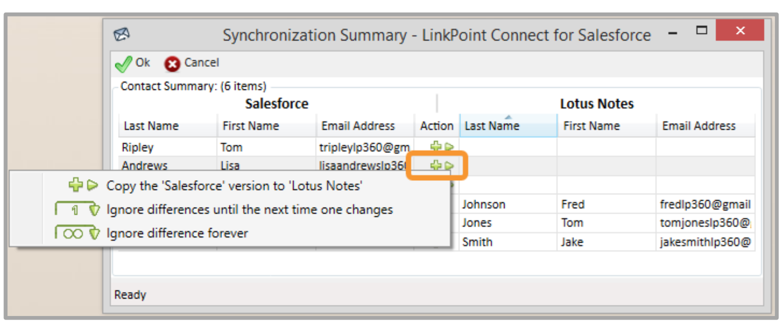
Tip: By default, LinkPoint Connect only syncs the Salesforce Contacts that the user owns.

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



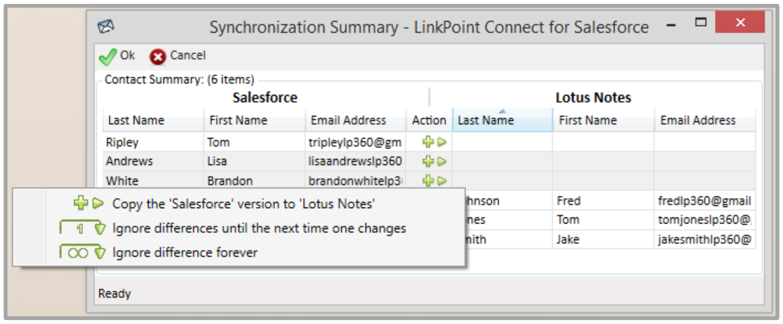
Icon	Action
	New Salesforce contact will be added to IBM Notes
	New IBM Notes contact will be added to Salesforce
	Updated Salesforce contact will be updated in IBM Notes
	Updated IBM Notes contact will be updated in Salesforce
	Deleted Salesforce contact will be removed from IBM Notes
	Deleted IBM Notes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

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**.

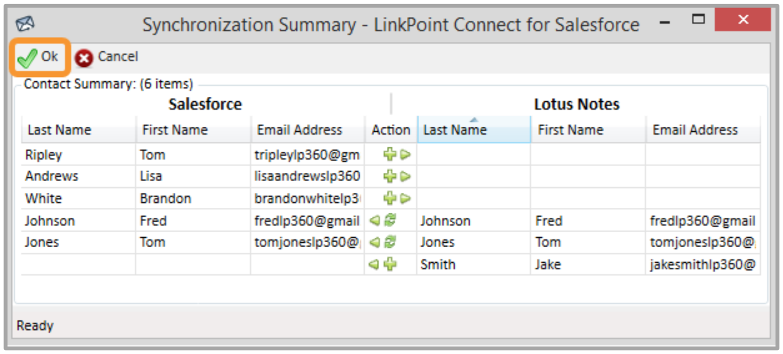


Example: This is useful for excluding specific contacts from the sync for a single time or to exclude a contact from the sync moving forward.

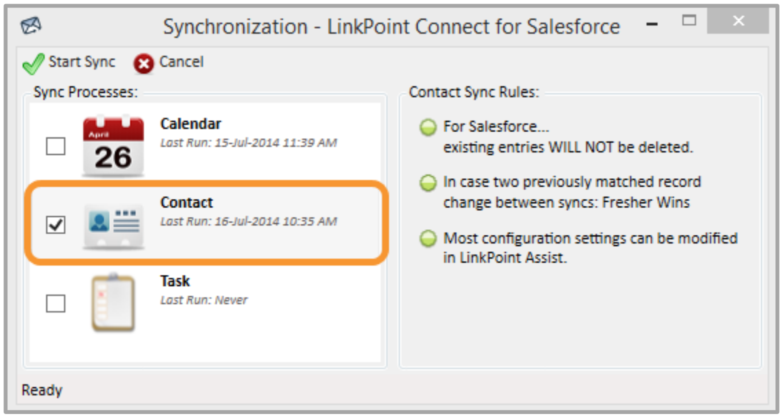
Tip: You can select multiple contacts to apply changes by clicking the contacts with your mouse while holding the Shift key on your keyboard. Once the contacts are selected, right click to review the Action options.



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



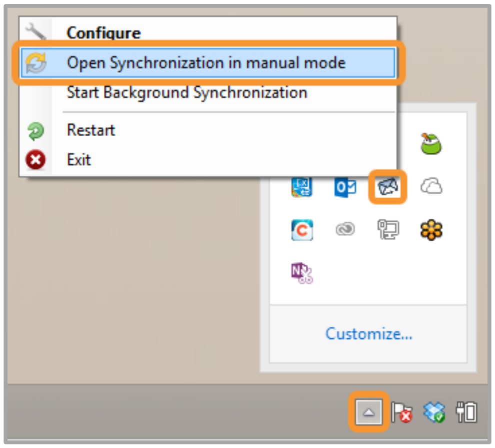
Tip: LinkPoint Connect will confirm the sync completion by updating the **Last Run** date and time in the Synchronization window.



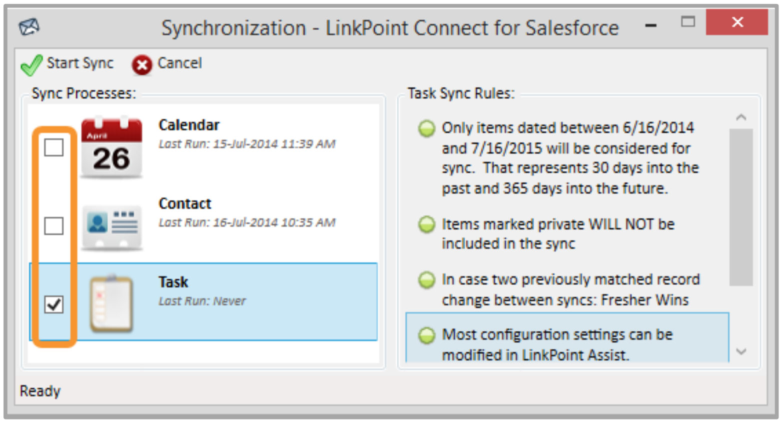
Syncing Tasks between IBM Notes and Salesforce with Manual Sync

LinkPoint Connect offers users the flexibility to control when and how their tasks are synchronized between IBM Notes and Salesforce 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 Salesforce.

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

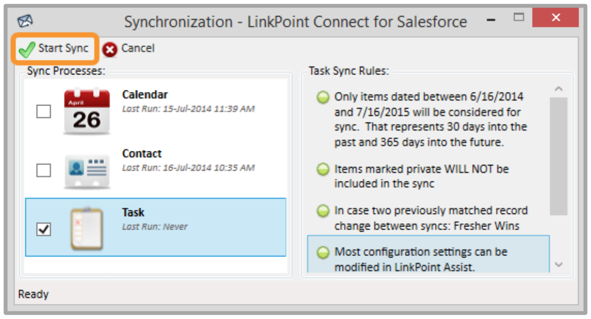


2. Select the **Task** checkbox. Deselect any other items you do not want to sync at this time.



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

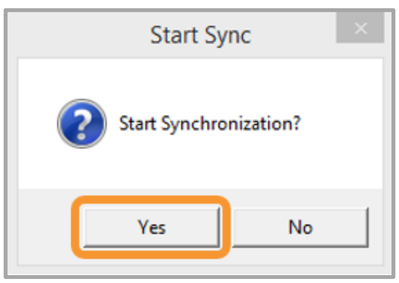
3 Click the **Start Sync** button to proceed.



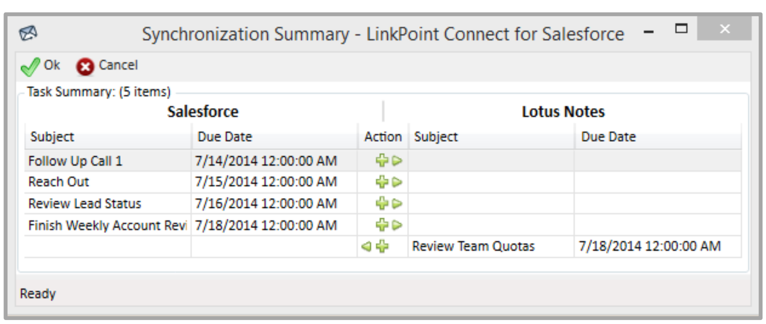
Tip: You will have a chance to review and confirm the items to be synchronized before the tool actually runs the synchronization process.

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

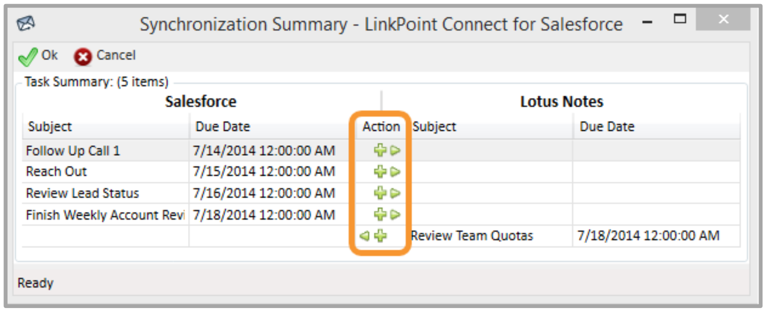
4 Click **Yes** in the Start Sync dialogue box.



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

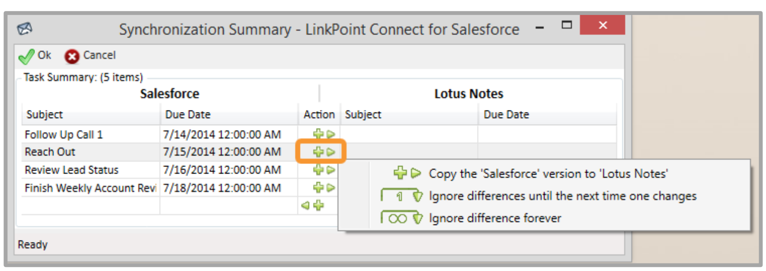


6 Review the icons in the **Action** column to determine how LinkPoint Connect will sync the displayed tasks. These actions relate to new, updated, or deleted tasks either in Salesforce or IBM Notes.



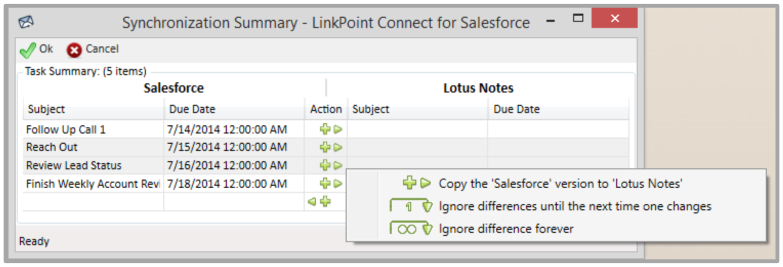
Icon	Action
	New Salesforce task will be added to IBM Notes
	New IBM Notes task will be added to Salesforce
	Updated Salesforce task will be updated in IBM Notes
	Updated IBM Notes task will be updated in Salesforce
	Deleted Salesforce task will be removed from IBM Notes
	Deleted IBM Notes task will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

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

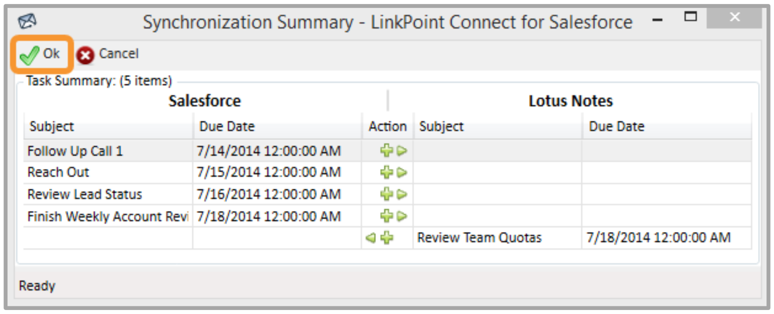


Tip: This is useful for excluding specific items from the sync for a single time or to exclude an item from the sync moving forward. Some users may have tasks that are not related to specific accounts and should not be added to Salesforce or IBM Notes.

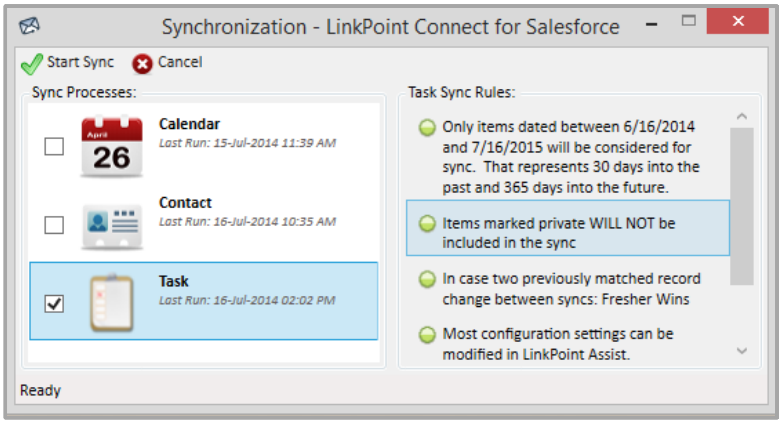
Tip: You can select multiple tasks to apply changes by clicking the items with your mouse while holding the Shift key on your keyboard. Once the items are selected, right click to review the Action options.



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



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

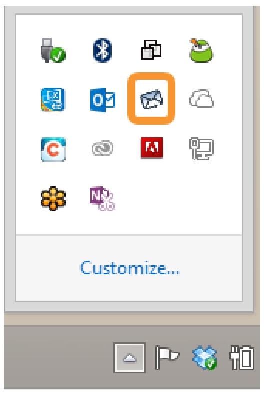


Configuring LinkPoint Connect Auto Sync Settings

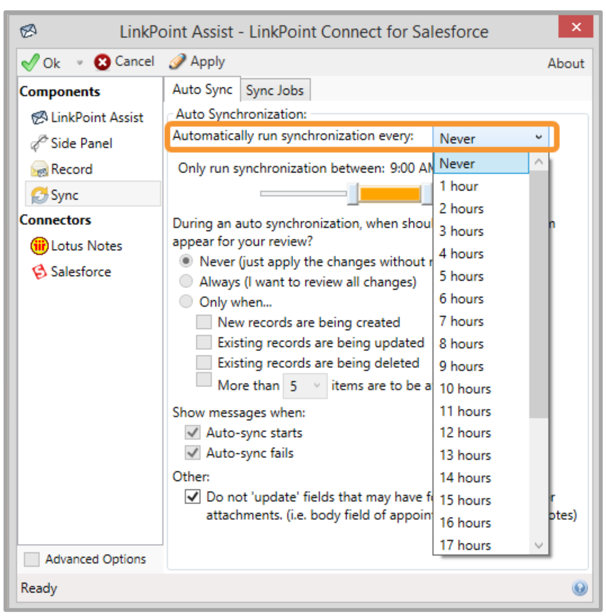
Before running a Manual Sync or scheduling an Auto Sync, it is important for users to become familiar with the available LinkPoint Connect sync settings. The synchronization of calendars, contacts and tasks works similarly but can be managed separately based on user preference. Users can set the timing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

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

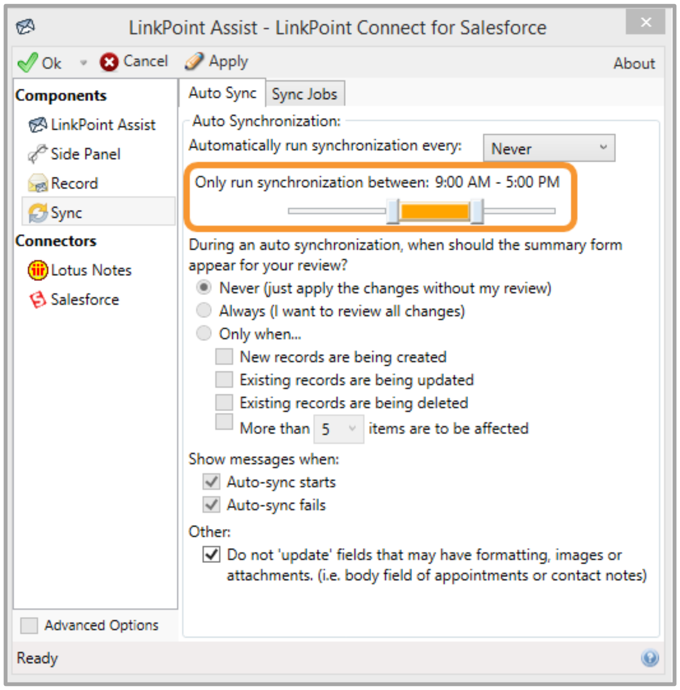
1 Double click the **LinkPoint Assist** icon in the system tray with the right mouse button to open LinkPoint Assist.



2 Select 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.



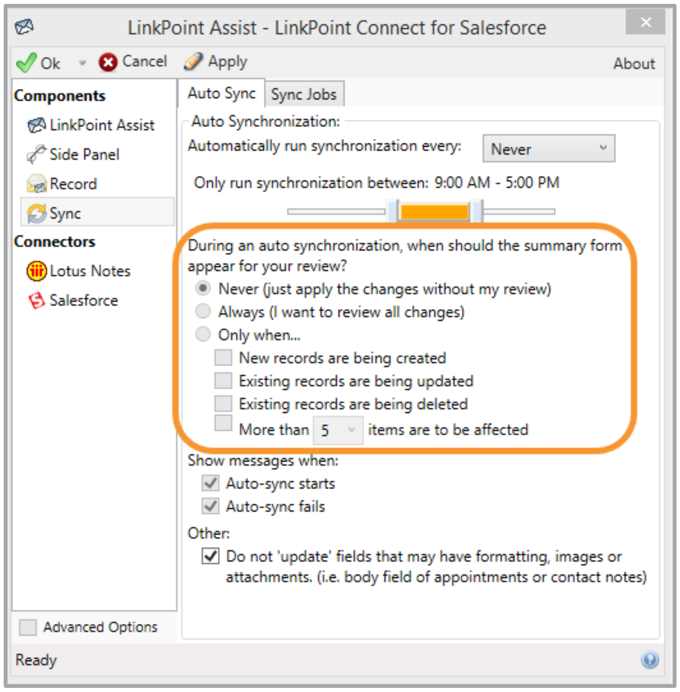
3 Select the time frame during which the Auto Sync should run during the day. Slide the selectors to the left or right to adjust the range.



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

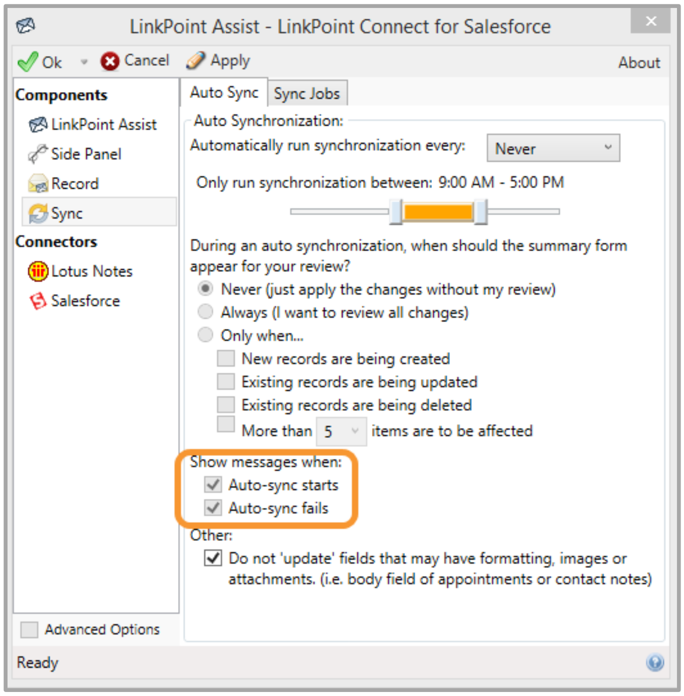
4

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

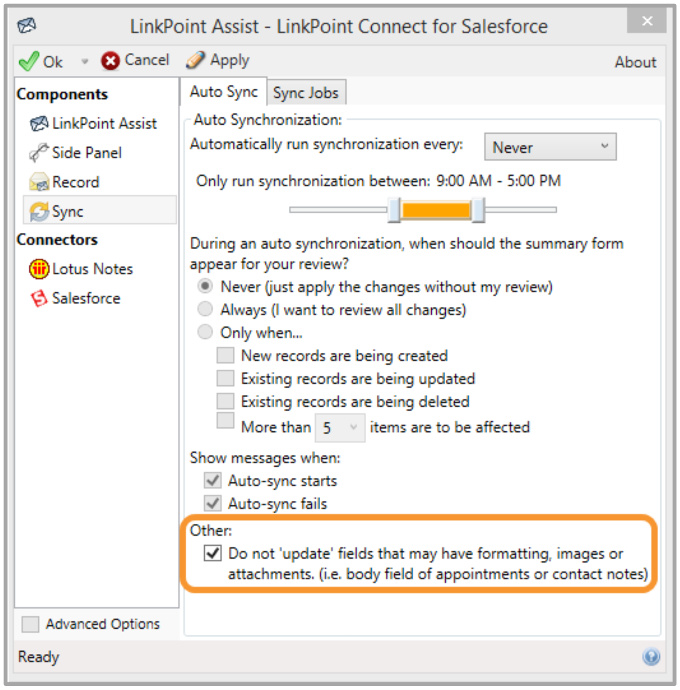


Tip: Auto Sync is designed to run with limited to no user interaction. Users can choose to set notifications to confirm when specific sync actions occur.

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

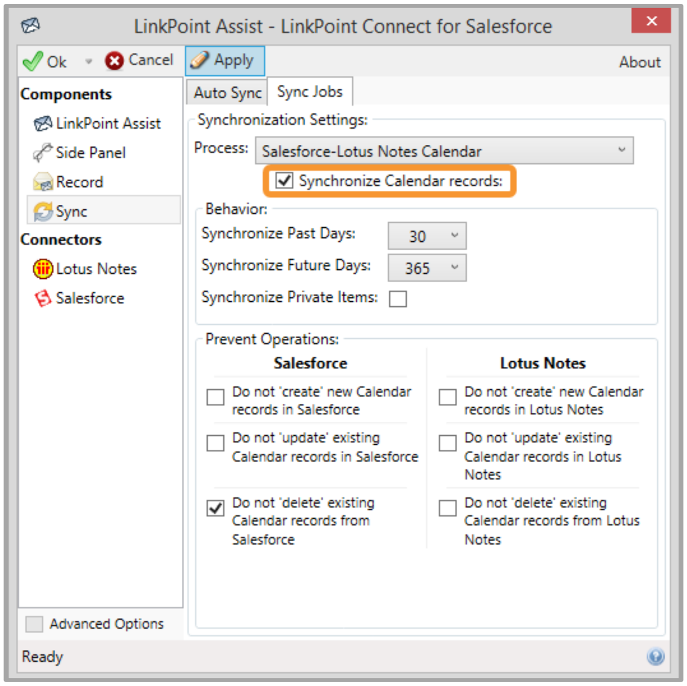


6 Select the checkbox in the **Other** section of the Auto Sync tab to prevent LinkPoint Connect from updating records in IBM Notes that have been changed in Salesforce if the original record content contained special formatting.



Example: For example, a user may have a calendar item in IBM Notes that contains special formatting (such as unique fonts or colors). When the item syncs to Salesforce, the original item retains its formatting in IBM Notes, but the copy of the item in Salesforce loses the formatting due to Salesforce limitations. If the user makes a change to the item in Salesforce, 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.

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

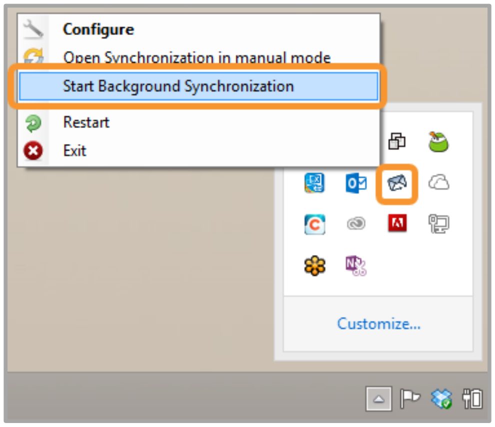


Tip: You will need to select the Process and then select the Synchronize checkbox for each item (i.e. Calendar, Contact, Task) that should be run in the Auto Sync.

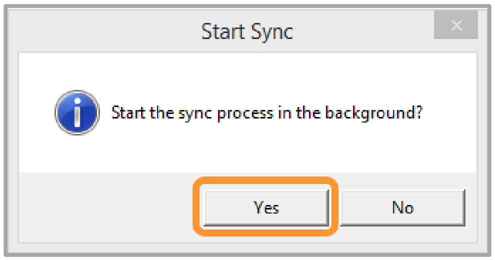
Running Background Synchronization with Auto Sync Settings

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

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



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



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

4. 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.

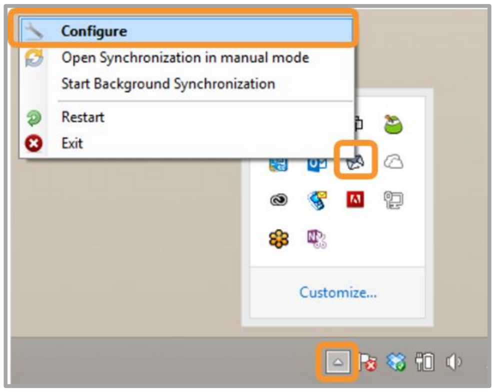
Rebuilding LinkPoint Connect Sync History

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 Salesforce and IBM Notes to better suit their needs. In this section, you will learn how to use the Rebuild History feature to reset your synchronization settings.

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

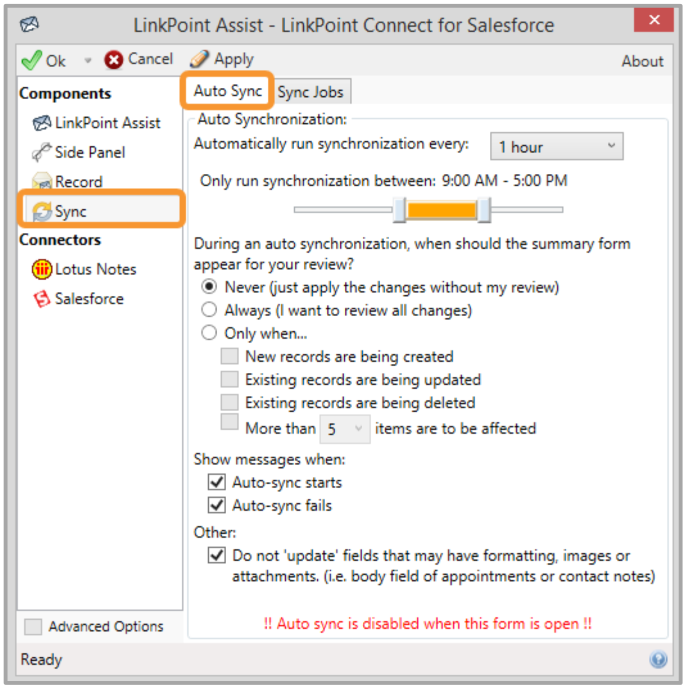
Example: In this example, we will run the Rebuild History feature on the Task synchronization. The process is the same for using Rebuild History with Calendar and Contact sync.

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



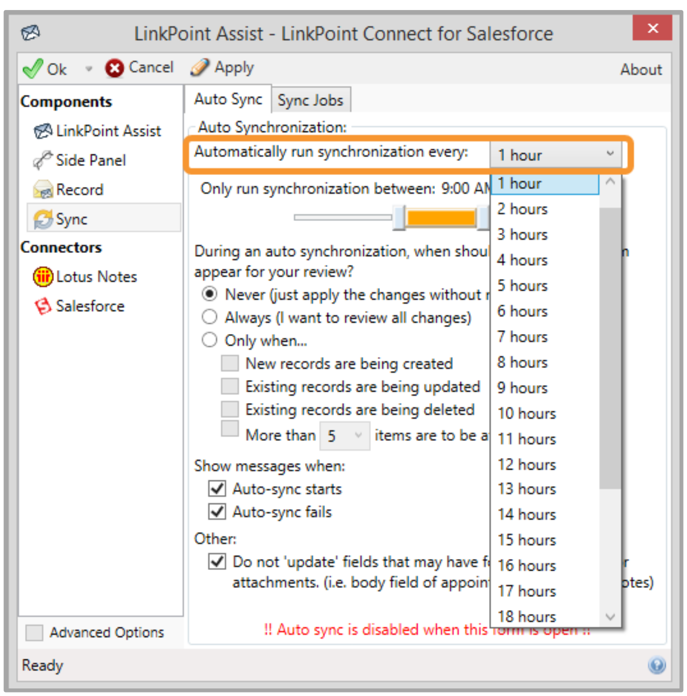
2

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



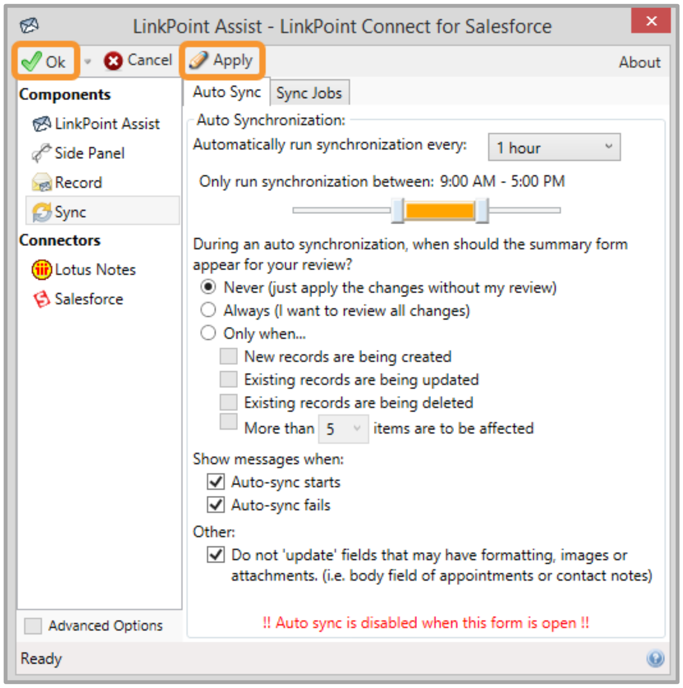
3

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



4

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

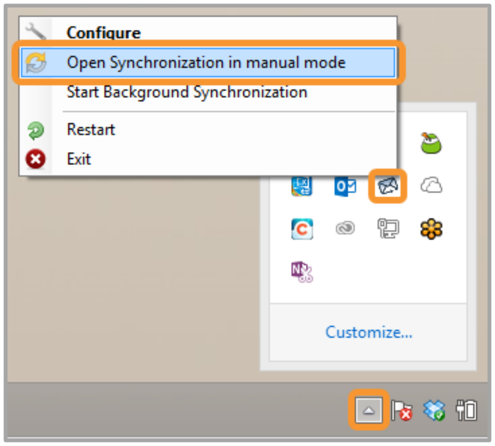


5

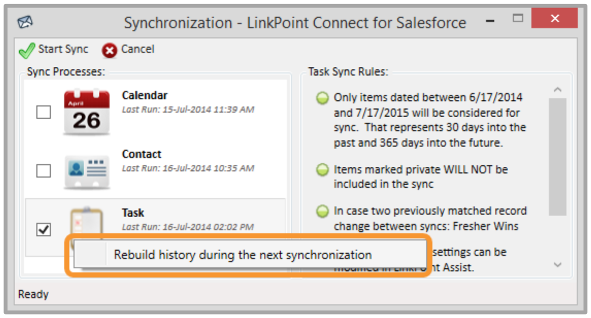
Remove or update any items within Salesforce or IBM Notes that were affected by prior sync as needed.

6

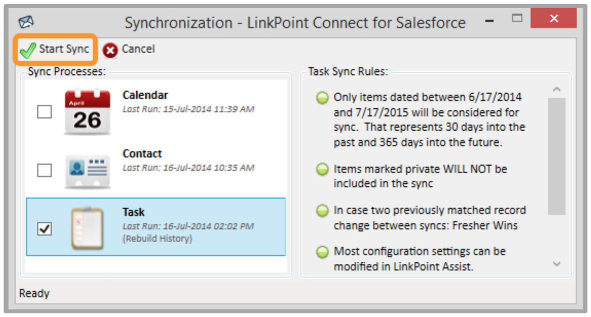
Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Open Synchronization in manual mode**.



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



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



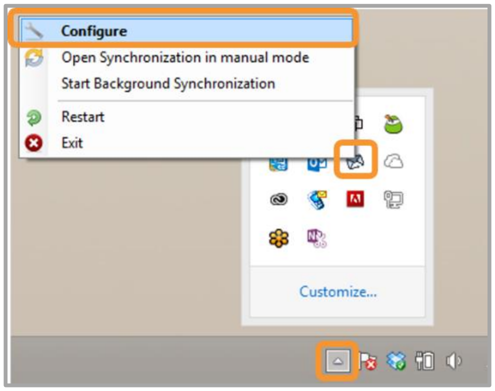
Additional Resources: You can read more about **Syncing Tasks between IBM Notes and Salesforce with Manual Sync**, as well as other Manual Sync options and features, earlier in this User Guide.

Configuring LinkPoint Connect

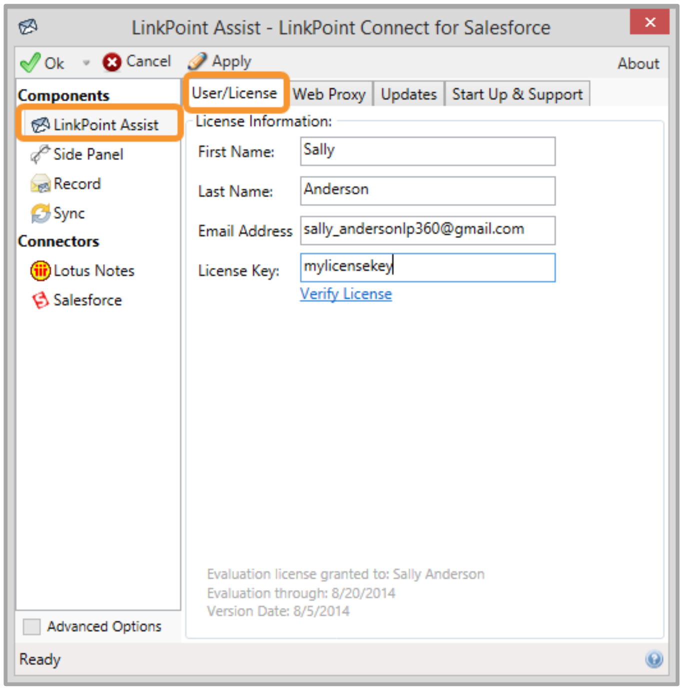
Configuring LinkPoint Assist

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

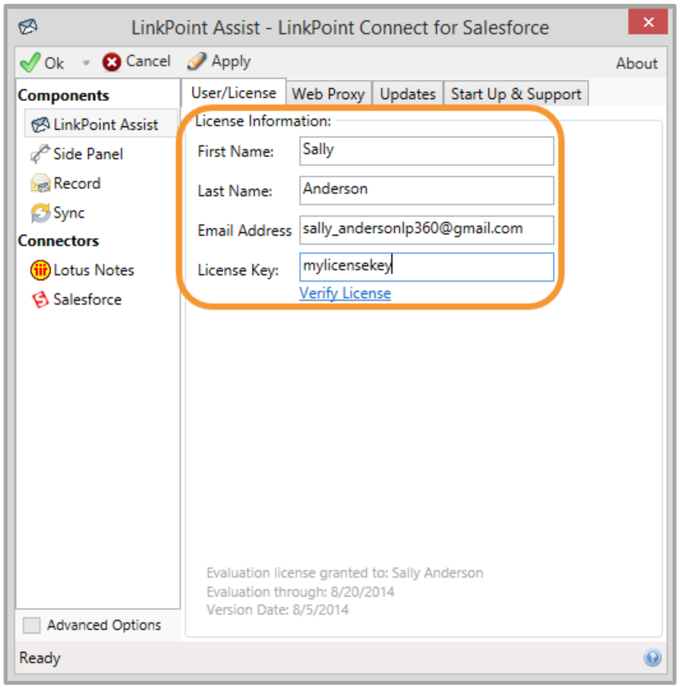
1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure.**



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

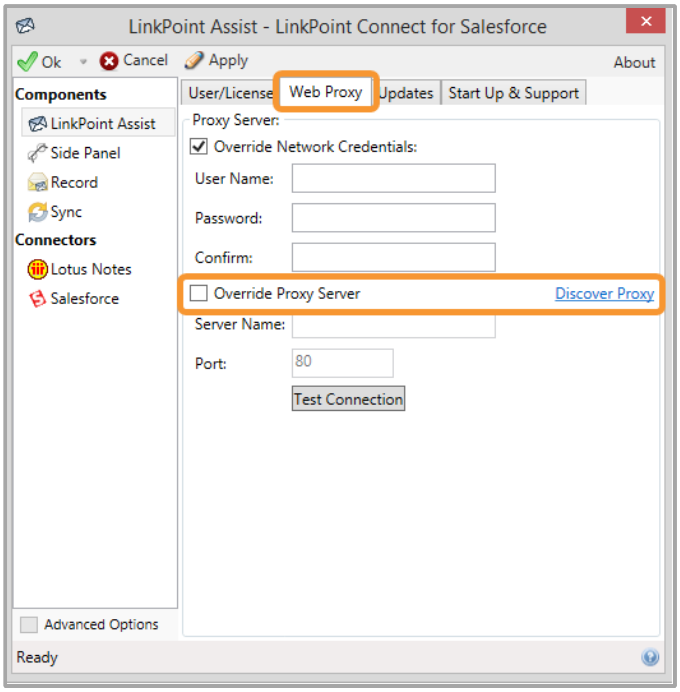


3 Manage **License Information** including user details or select **Verify License** as needed.

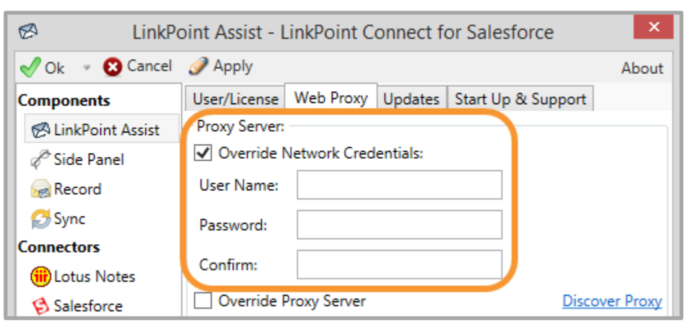


Additional Resource: Refer to the **Entering a License Key** section of this User Guide for more information on this configuration section.

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

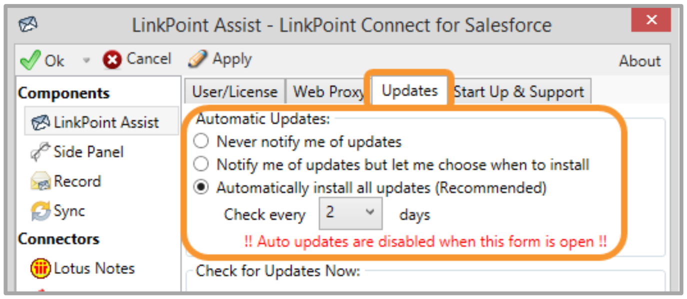


Tip: If you are required to provide credentials to get through the web proxy, select the **Override Network Credentials** checkbox and enter your **User Name** and **Password**. Click the **Test Connection** button to confirm that the Web Proxy is configured correctly.

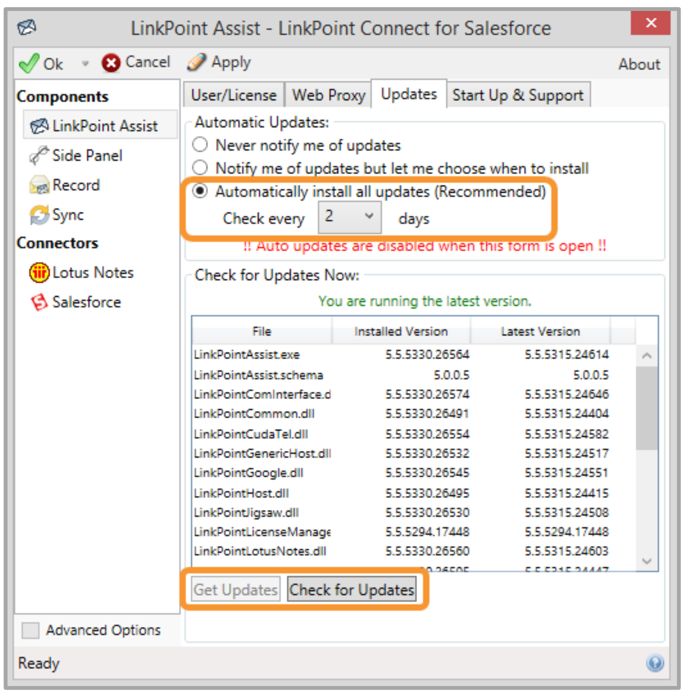


5

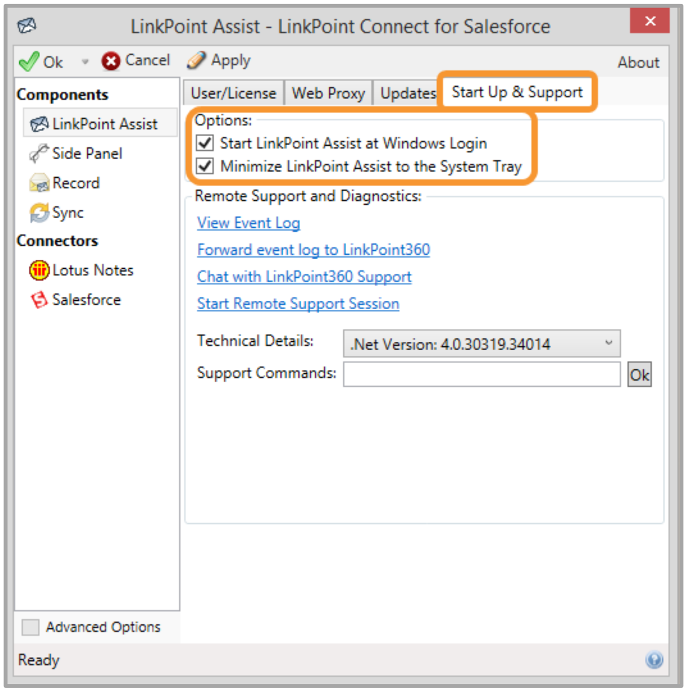
Select the **Updates** tab and select an option for **Automatic Updates**. Users can choose to let updates run automatically, approve updates before they are installed, or prevent updates altogether. Users can also set how frequently the software should check for updates with the **Check every X days**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



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



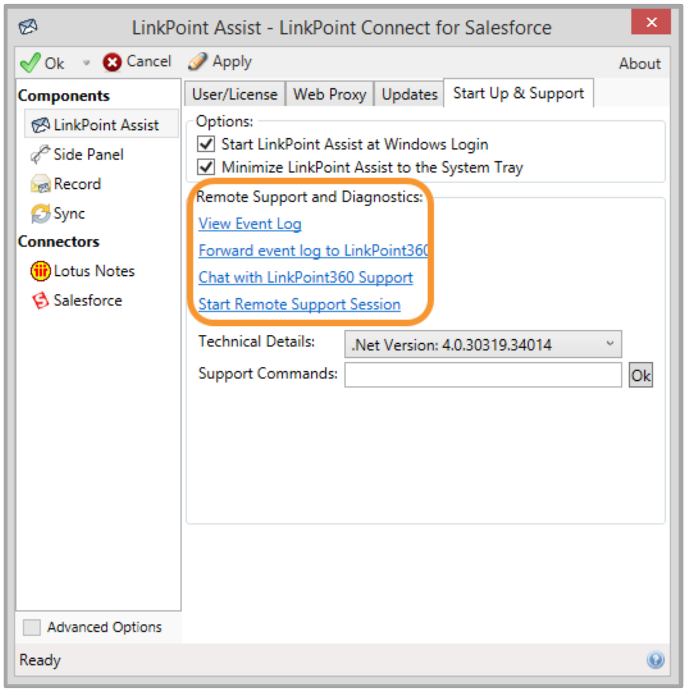
6 Select the **Start Up & Support** tab. Select or deselect the options to **Start LinkPoint Assist at Windows Login** and to **Minimize LinkPoint Assist to the System Tray** based on user preference.



7

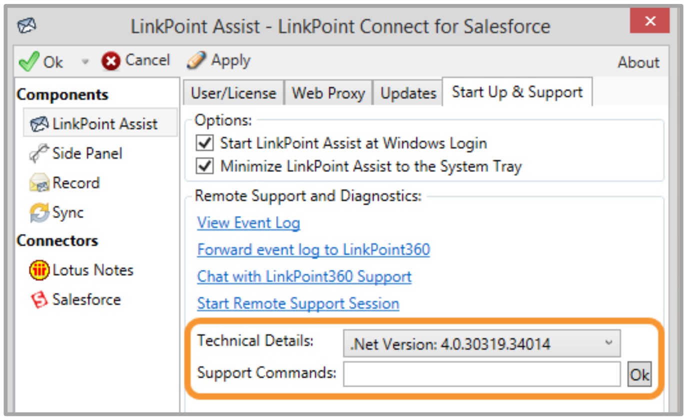
Select from available **Remote Support and Diagnostics** options when working with or reaching out to the LinkPoint360 Support Team.

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



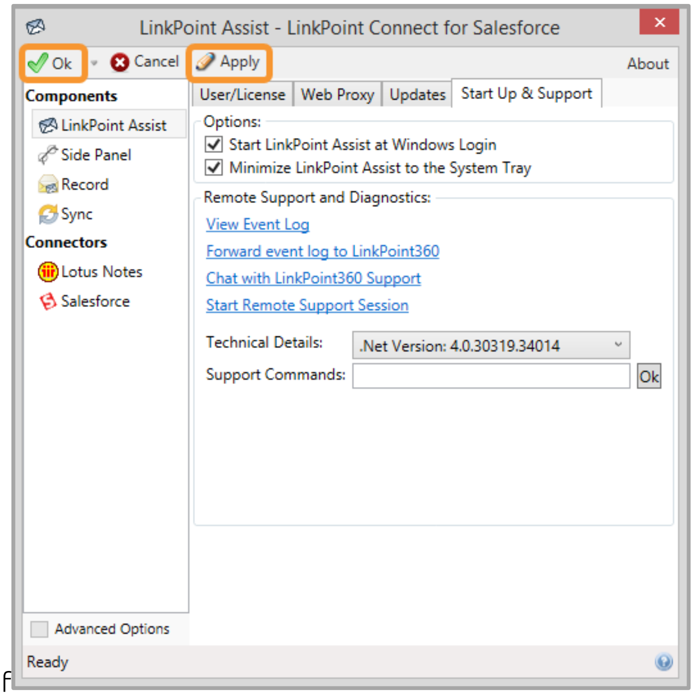
Tip: The **Start Up & Support** tab includes additional tools used by the LinkPoint360 Support team when troubleshooting issues for customers.

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



8

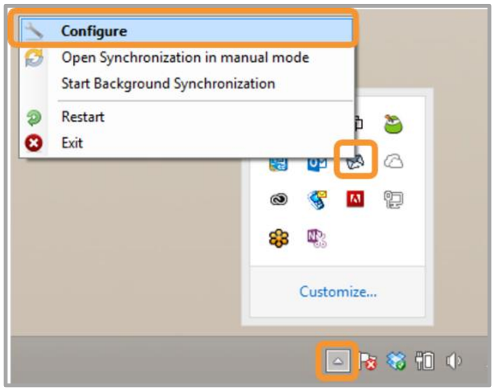
Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



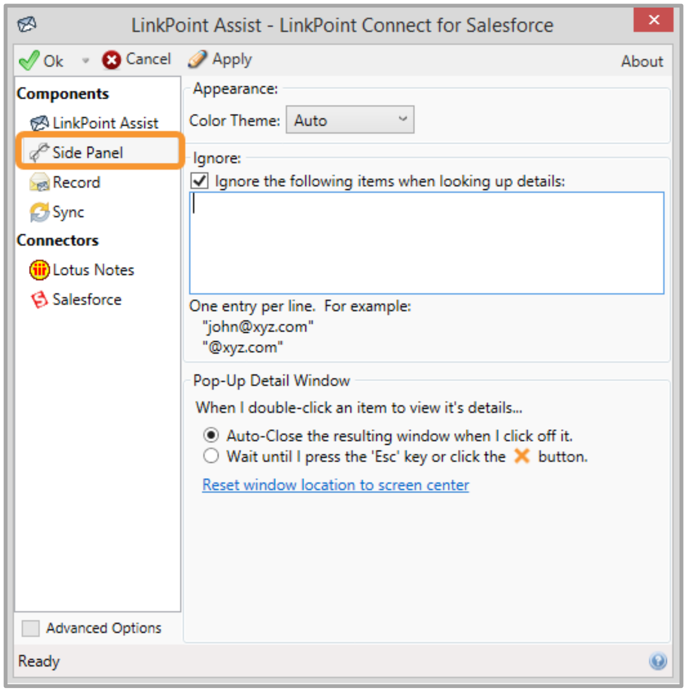
Configuring the LinkPoint Connect Side Panel

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

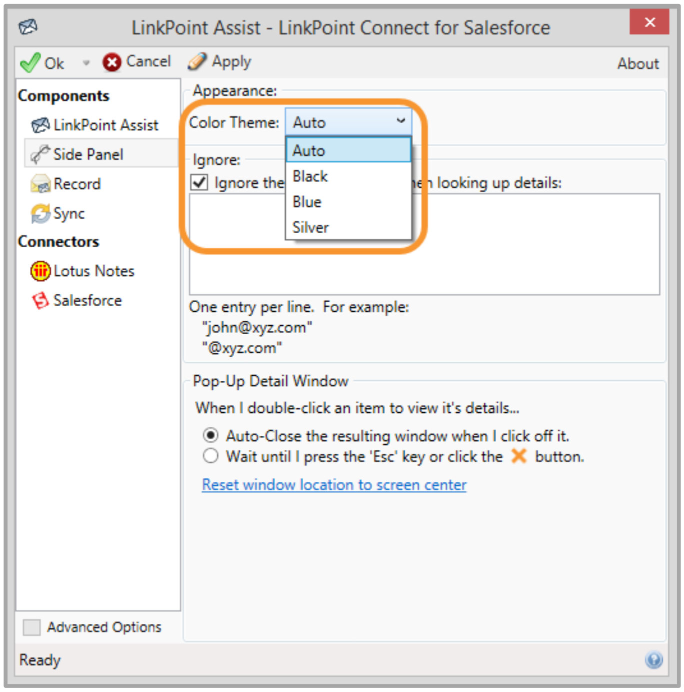
1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure.**



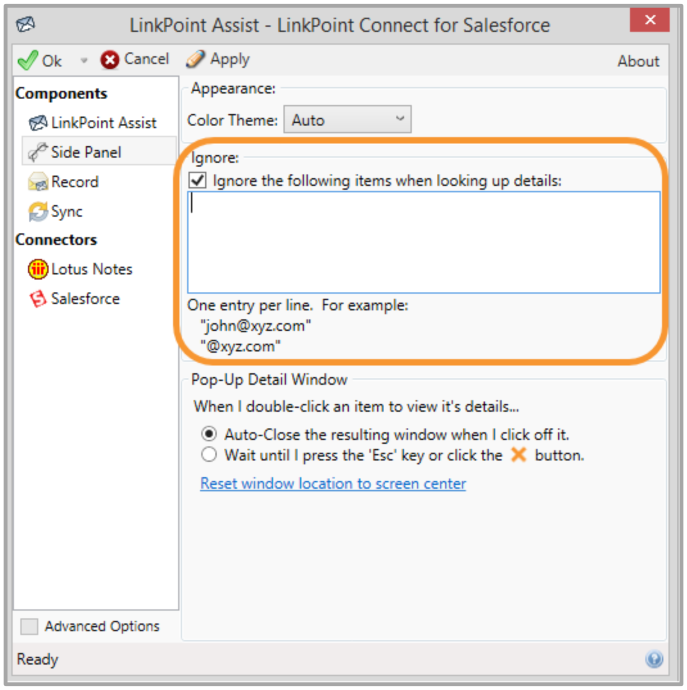
2 Select **Side Panel** from the **Components** list on the left side of the **LinkPoint Assist** window.



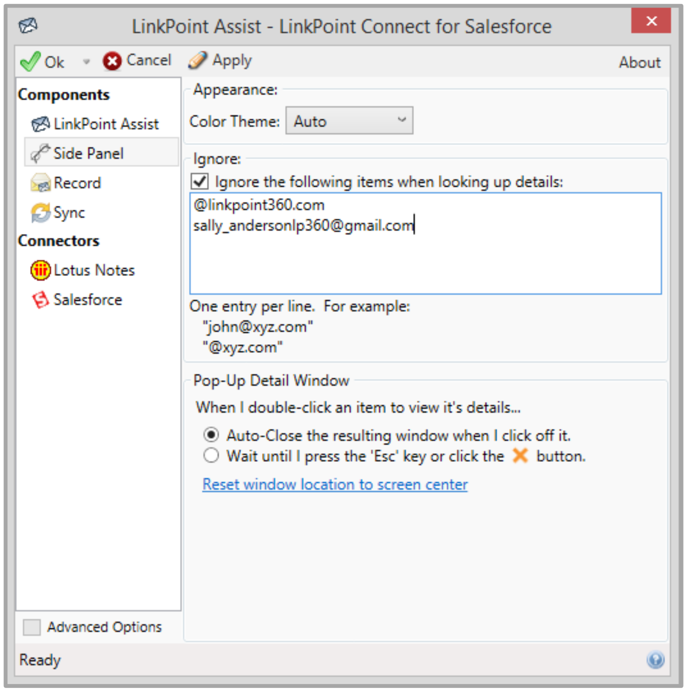
3 Select a **Color Theme** from the drop-down list to change the **Appearance** of the Side Panel. Note that **Auto** is the default option.



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

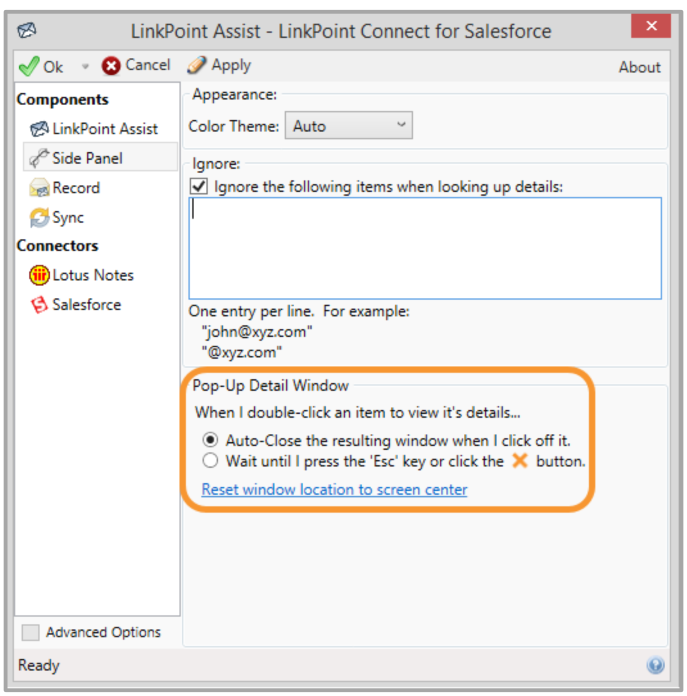


Tip: This is especially useful for excluding yourself or others in your organization from the Search Results or Contact List.



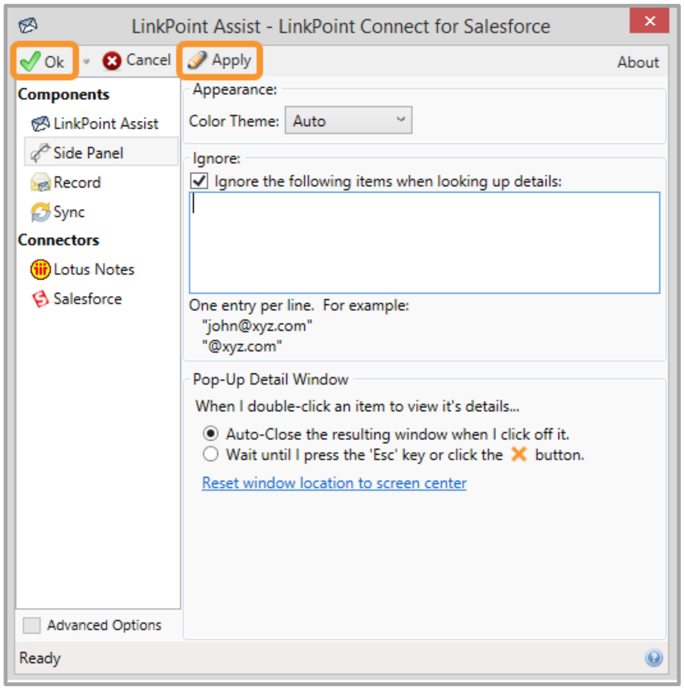
5

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



6

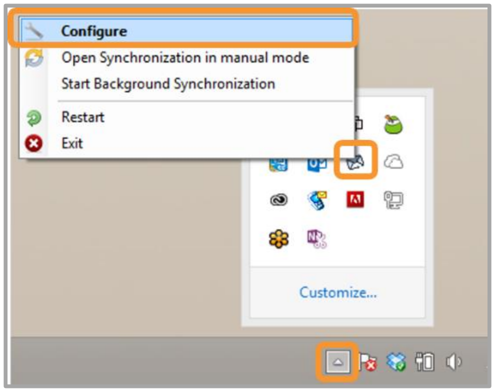
Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



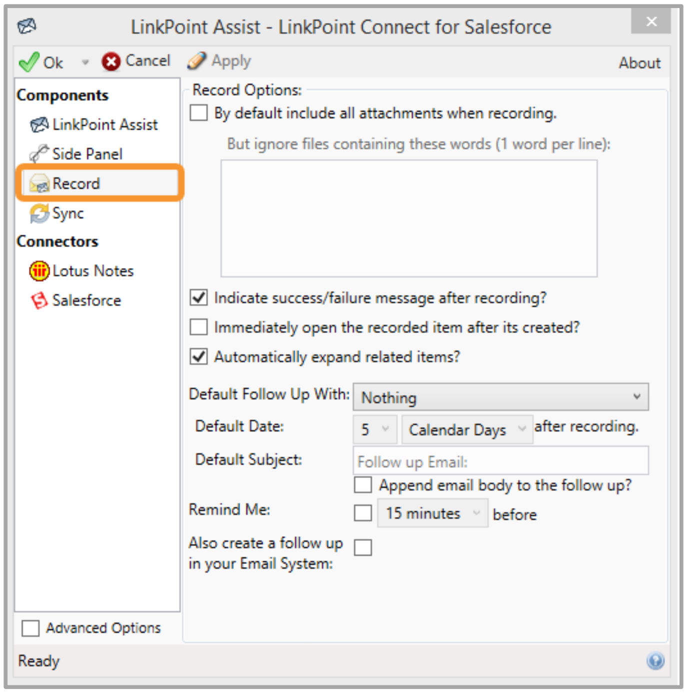
Configuring LinkPoint Connect Record Functionality

LinkPoint Assist guides users through simple configuration processes to adapt LinkPoint Connect to individual and organizational needs. Various settings are available for managing the way that LinkPoint Connect displays Salesforce 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 Salesforce from IBM Notes.

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

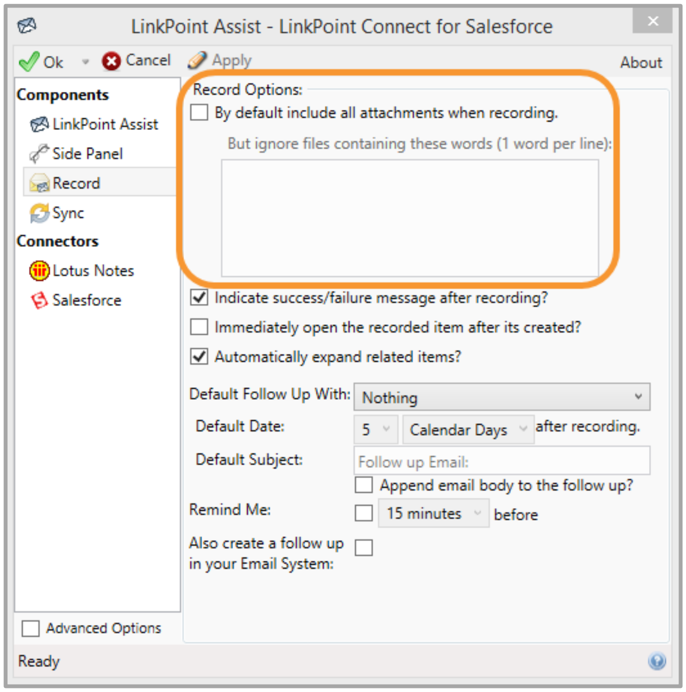


2 Select **Record** from the **Components** list on the left side of the **LinkPoint Assist** window.



3

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

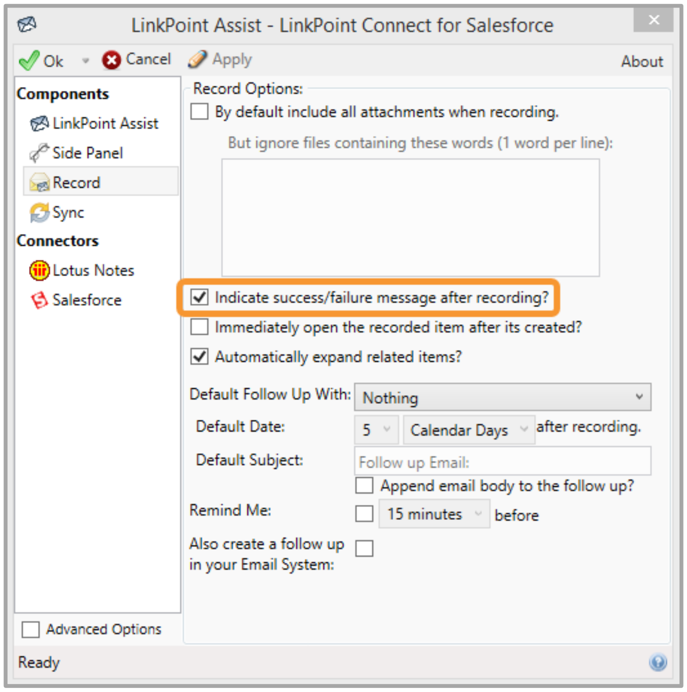


Example: You can list file extensions such as *.png* or *.jpg* to screen out images commonly found in email signatures. You can filter out files with words such as *brochure* or *pricing* to exclude items you commonly send to people that do not need to be saved over and over again in Salesforce, especially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

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

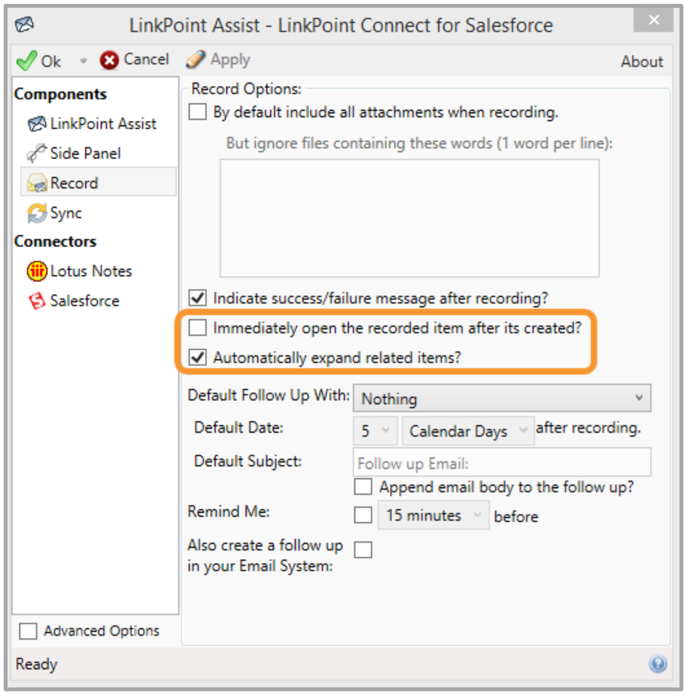
4

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



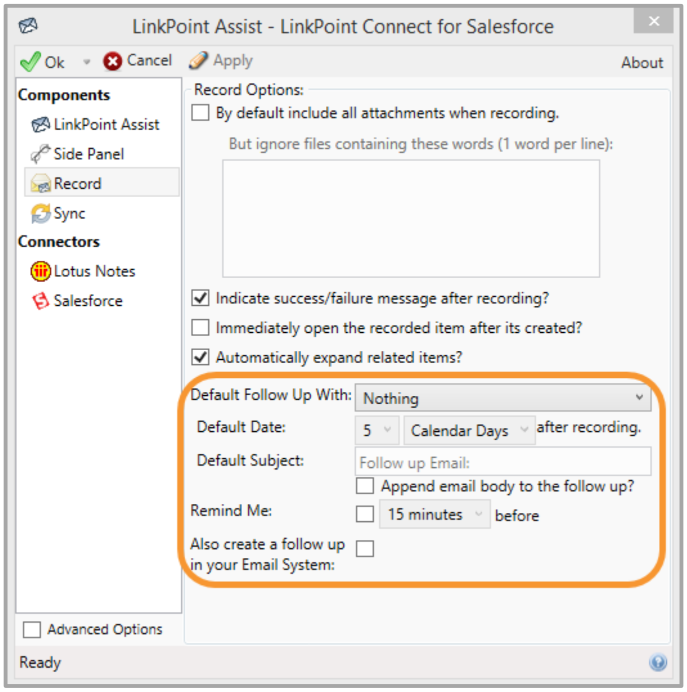
5

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



6

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

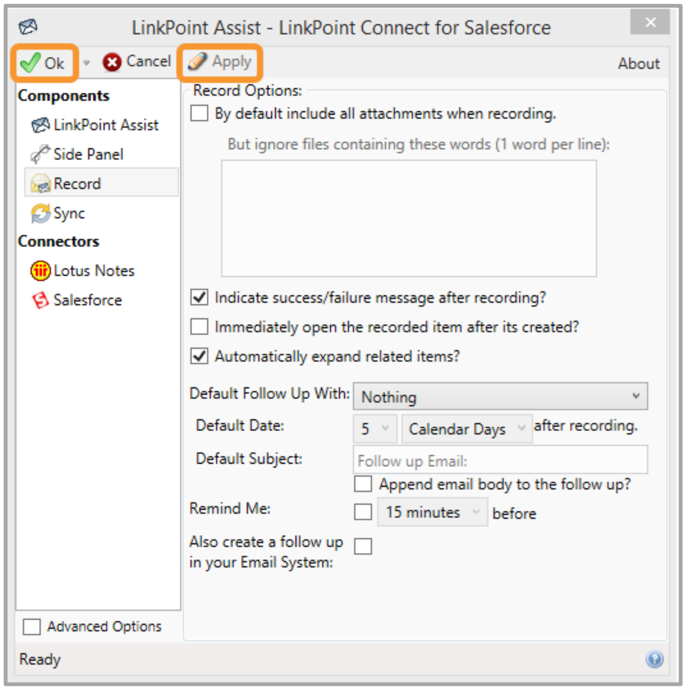


Tip: This feature is helpful for users who set similar or repetitive follow up actions when recording emails.

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

7

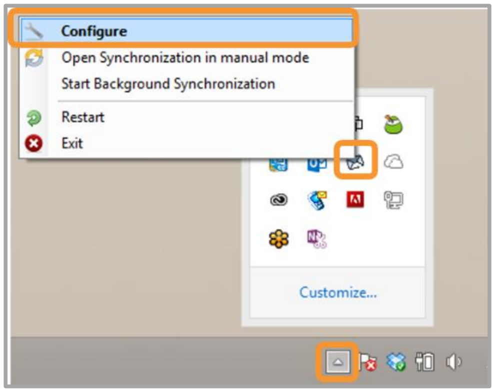
Click the **Apply** button to confirm the selection and click the **OK** button to finish and exit LinkPoint Assist.



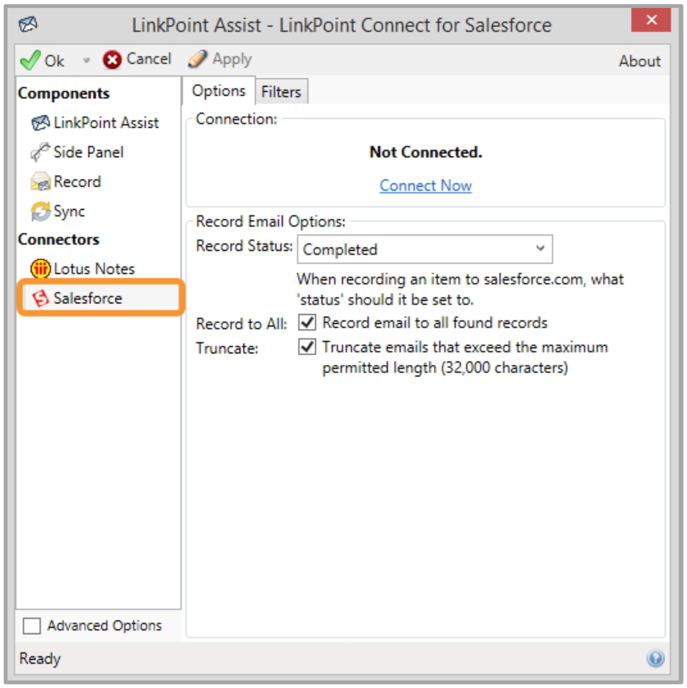
Configuring the LinkPoint Connect Salesforce Connector

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 Salesforce data, records emails, and syncs information between systems. In this section, you will learn how to configure Options and Filters for the Salesforce Connector in LinkPoint Assist.

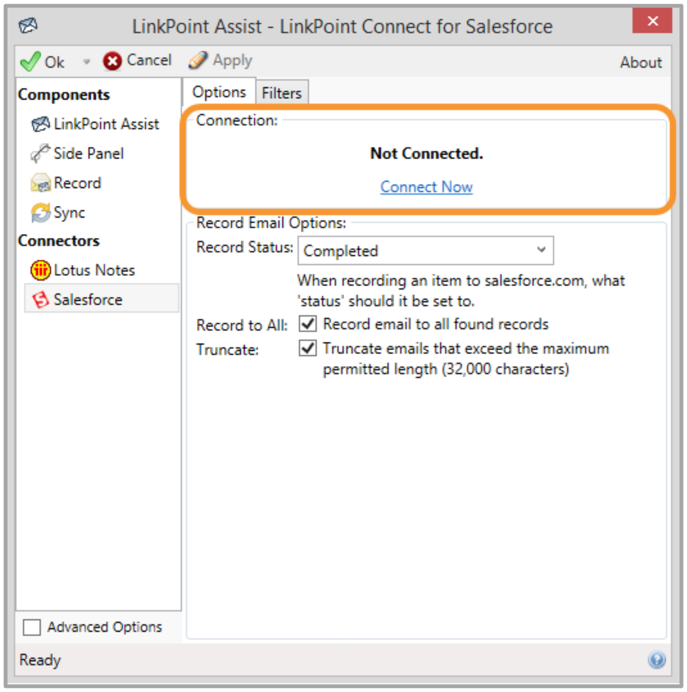
1 Click the **LinkPoint Assist** icon in the system tray with the right mouse button and then select **Configure.**



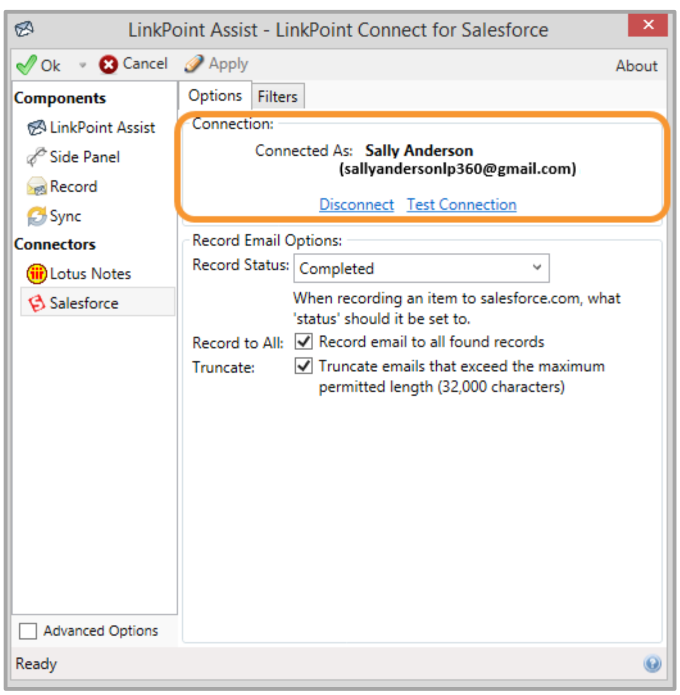
2 Select **Salesforce** from the **Components** list on the left side of the **LinkPoint Assist** window.



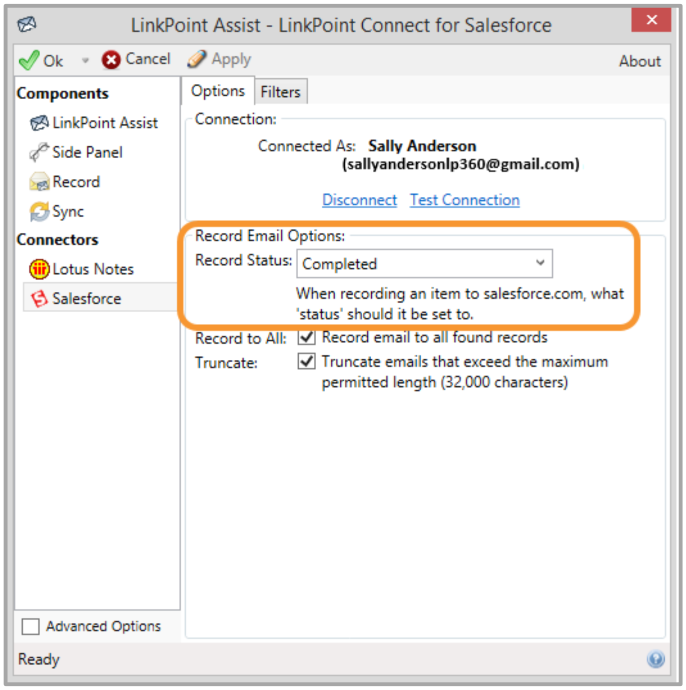
3 Select **Connect Now** to relate the Salesforce account to LinkPoint Connect if not already connected.



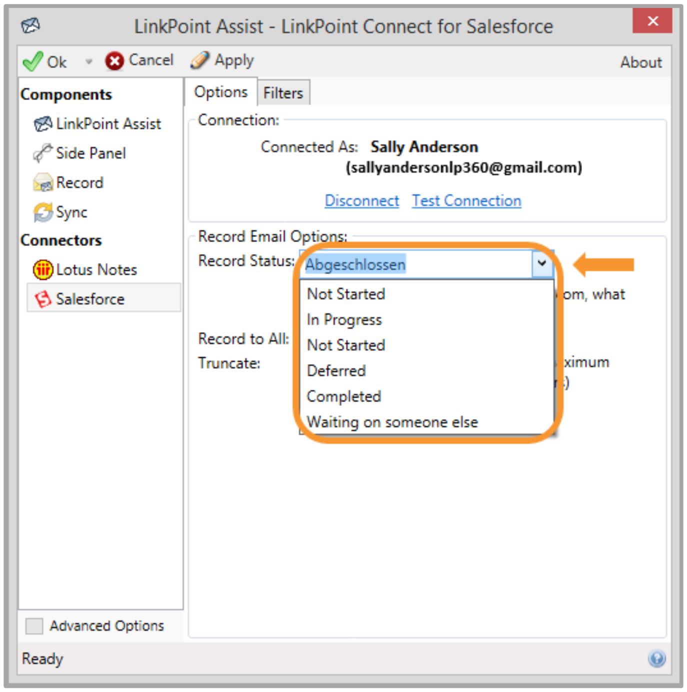
4 Select **Disconnect** to disassociate LinkPoint Connect. Select **Test Connection** to confirm that the Salesforce account is correctly tied to LinkPoint Connect.



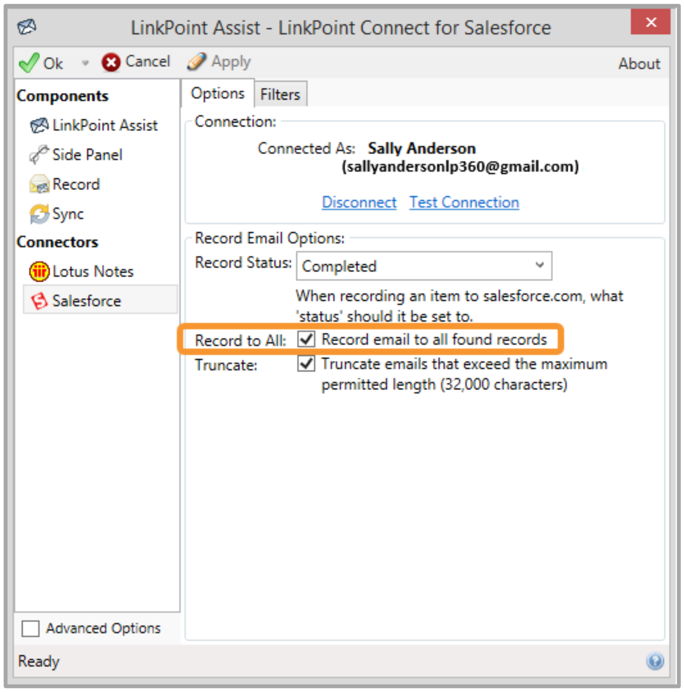
5 Select the **Record Status** from the drop-down list to determine the status of the item when it is entered in Salesforce on the Activity History.



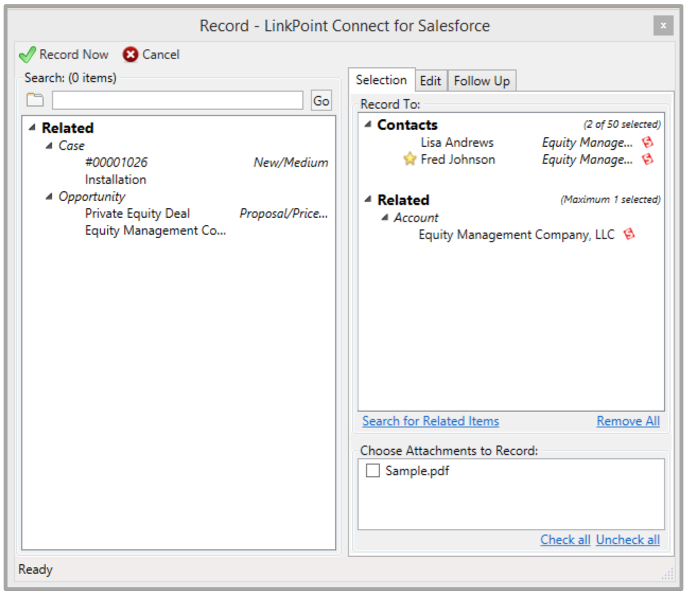
Tip: LinkPoint Connect will set the Record Status to **Completed** and offers a list of 6 default options which mirror Salesforce default statuses. The majority of LinkPoint Connect users leave the Record Status set to Completed so that it does not show as an open activity within Salesforce. If your organization uses different names for statuses, you can click in the Record Status field and type in the Salesforce status exactly how it appears in your system.



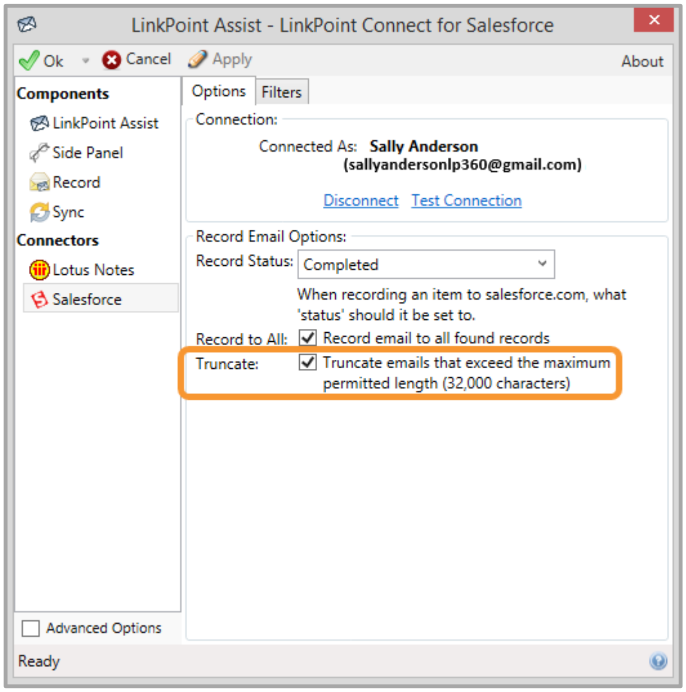
6 Select **Record to All** to cause LinkPoint Connect to recommend and add related contacts to the Record To field in the Record window. This includes contacts in the To:, Cc:, and Bcc: fields. This option is on by default.



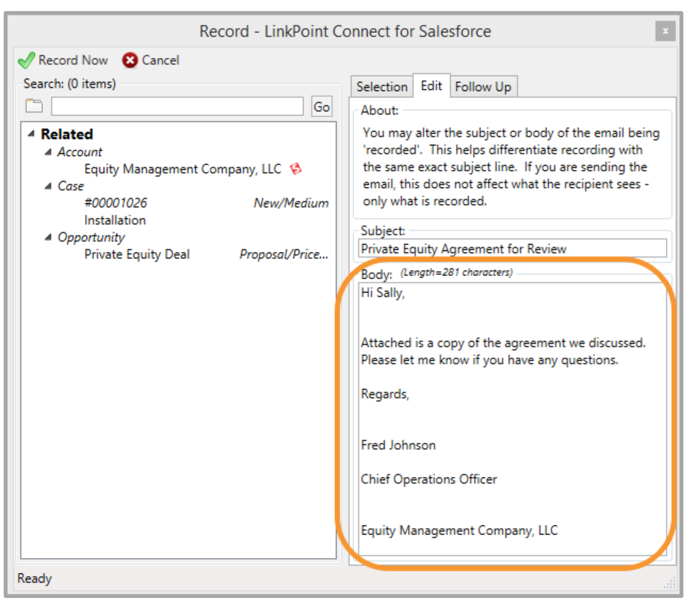
Example: With the Record to All option enabled, the contacts related to the email being recorded are automatically entered into the Record To field. The user is able to remove any contacts from the field before recording the email.



7 Select **Truncate** to shorten the body content of emails that exceed the Salesforce limit of 32,000 characters. This option is on by default.

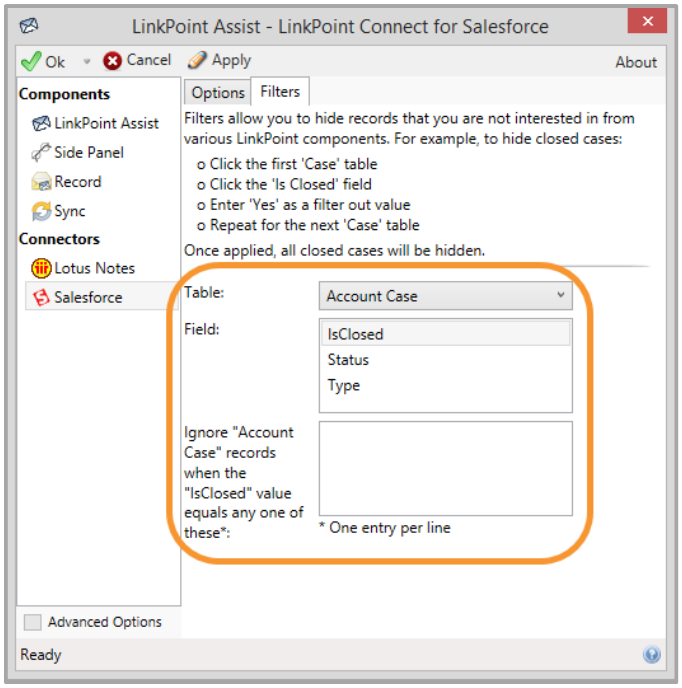


Warning: If you disable this option, you will receive an error message if you try recording an email that contains more than 32,000 characters. You can edit the content of longer emails to truncate the information yourself by selecting the Edit tab within the Record window and working with the content in the Body field. This field includes a character count for your reference. See the section on **Editing Email Content When Recording to Salesforce from IBM Notes** earlier in this User Guide for more information.



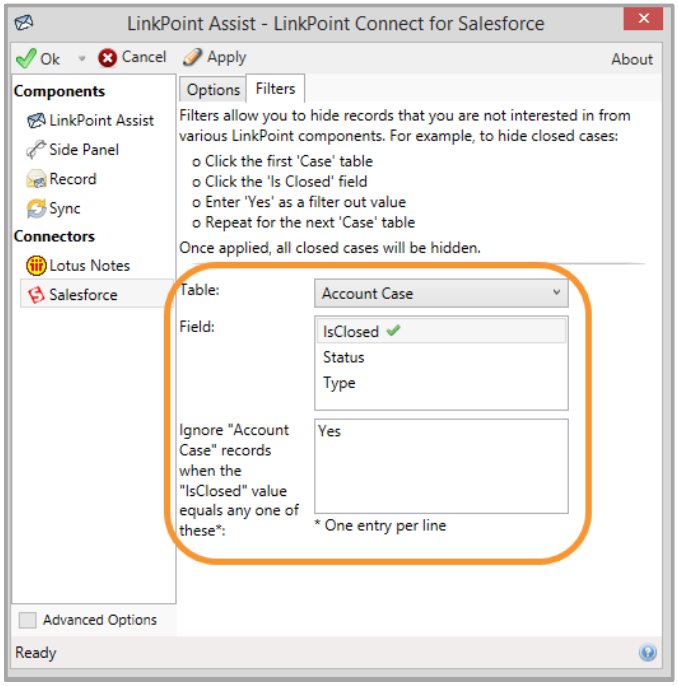
8

Select the **Filters** tab. Select the record type to work with, and then select the field associated with the record. Enter the values to determine the action applied to the selected items.



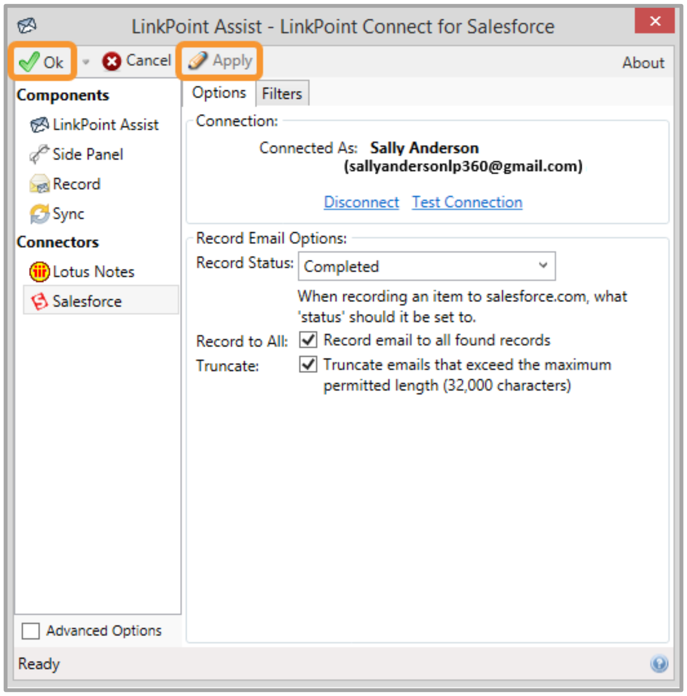
Tip: Users can set specific criteria to hide objects or fields from Salesforce and prevent them from being visible in the LinkPoint Connect. The items in the **Field** box change dynamically as different **Table** items are selected.

Example: Some organizations do not want to include closed cases as options for LinkPoint Connect users to record to. In this example, the user or admin would select **Account Case** or **Contact Case** as the **Table**. Then select **IsClosed** from the **Field** options. In the final entry box, enter **Yes**.



9

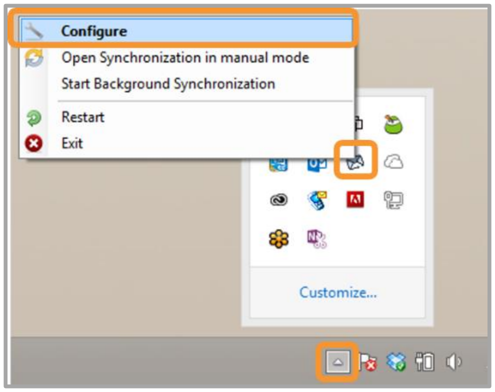
Click the **Apply** button when finished to finalize the settings. Click **Ok** to close LinkPoint Assist.



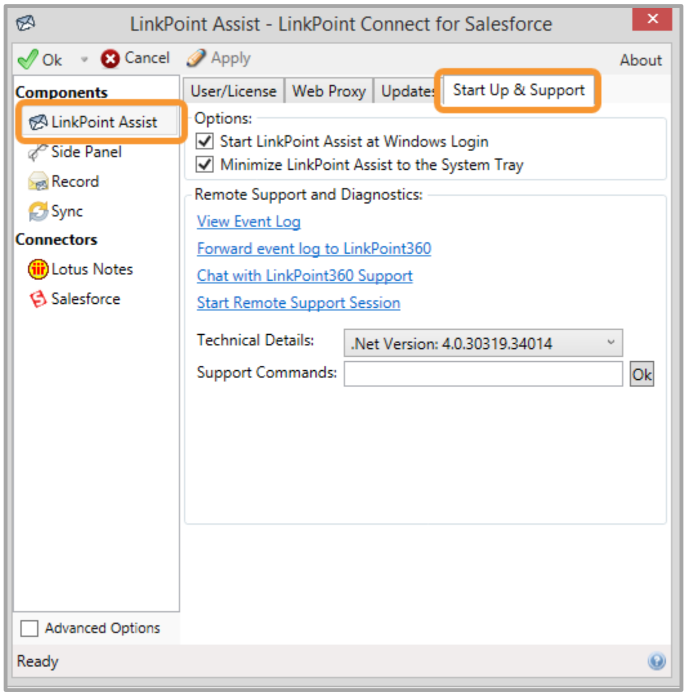
Configuring LinkPoint Connect with a Salesforce Sandbox Account

LinkPoint Connect customers that require specific customization via the LinkPoint360 Professional Services Team will need to be able to test and run LinkPoint Connect with a Salesforce Sandbox account. This provides customers with a way to review configurations and confirm how they would like their integration to work. In this section, you will learn how to configure LinkPoint Connect with your Salesforce Sandbox account.

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

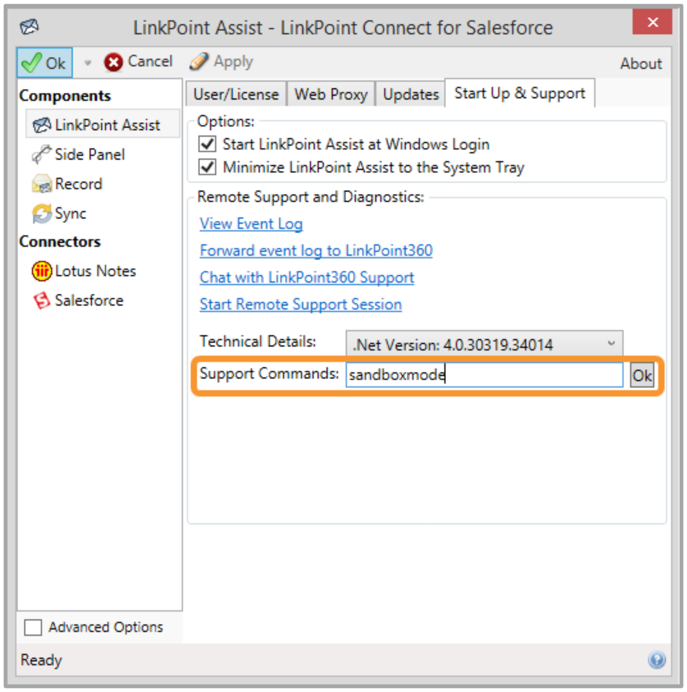


2. Select **LinkPoint Assist** from the **Components** list on the left side of the **LinkPoint Assist** window, and then select the **Start Up & Support** tab.

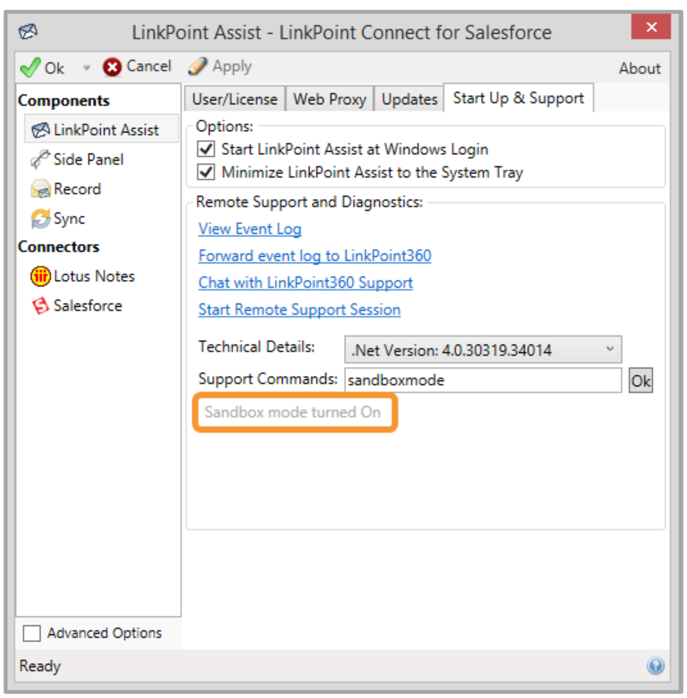


3

Enter *sandboxmode* in the **Support Commands** field and click the **Ok** button.

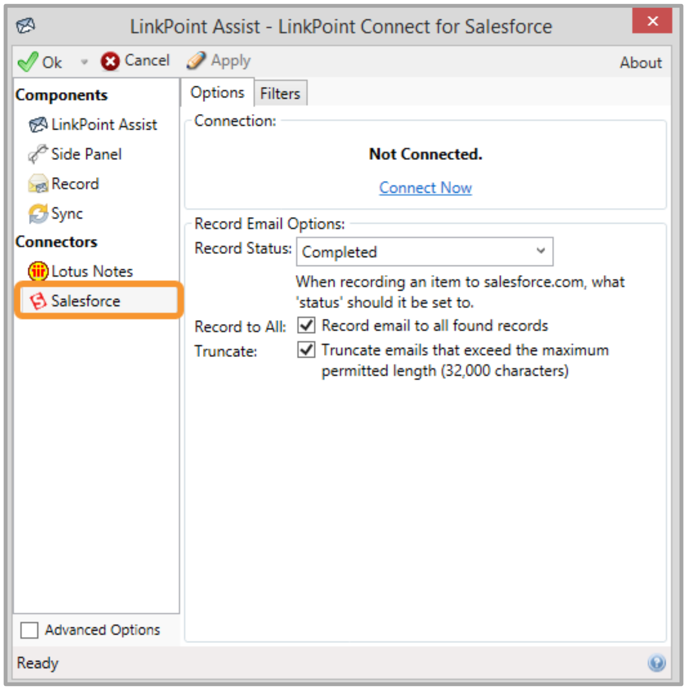


Tip: Note the message **Sandbox mode turned On** at the bottom of the Start Up & Support tab. To exit Sandbox Mode, enter *sandboxmode* in the Support Commands field and click **Ok**.



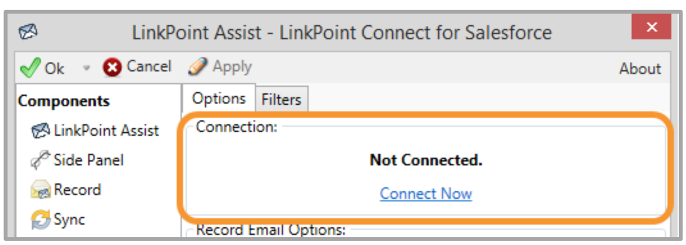
4

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

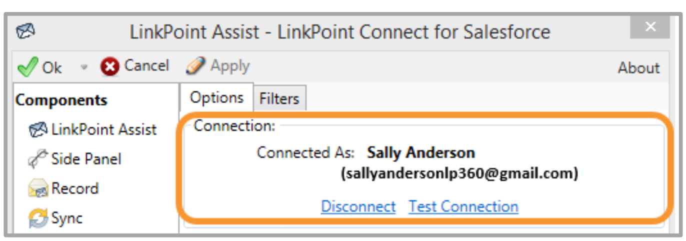


5

Select **Connect Now** to relate the Salesforce account to LinkPoint Connect if not already connected.

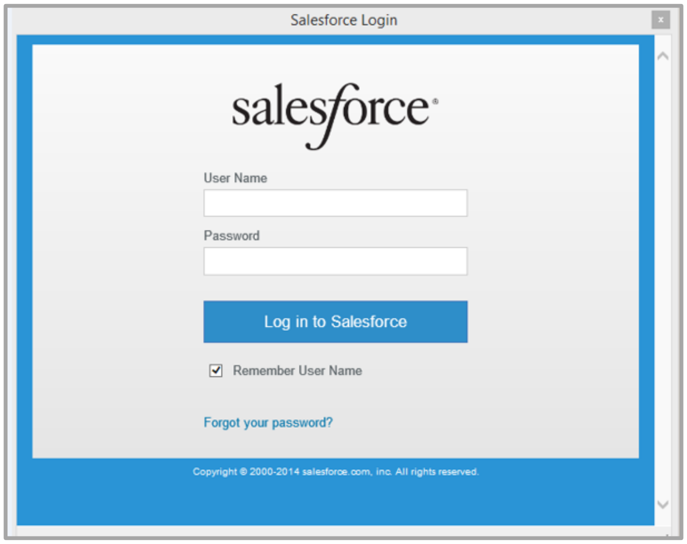


Tip: If you are already connected to Salesforce with a non-sandbox account, you will need to select **Disconnect** to proceed.



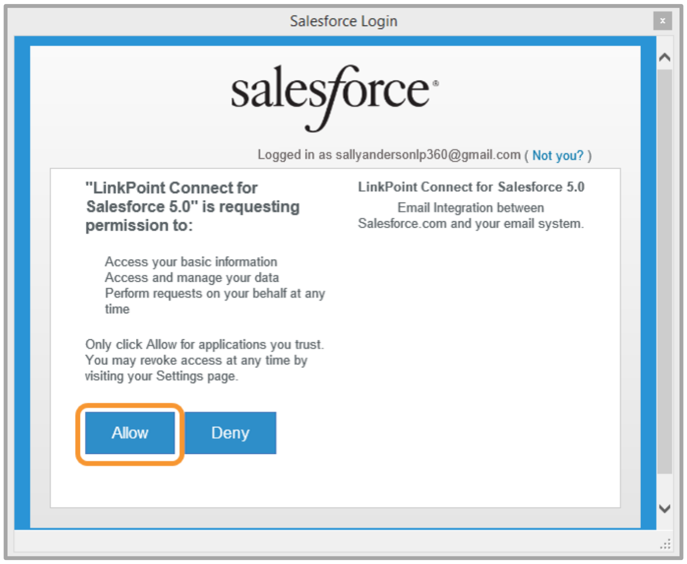
6

Enter your Salesforce Sandbox Account **User Name** and **Password**, and click the **Log in to Salesforce** button.

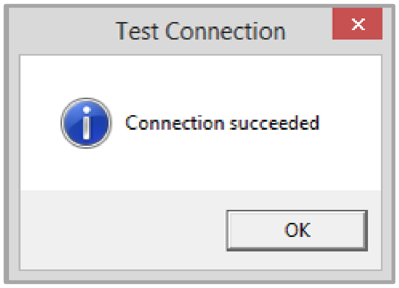


7

Click **Allow** to enable LinkPoint Connect to access your Salesforce account and display your Salesforce information in IBM Notes.



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



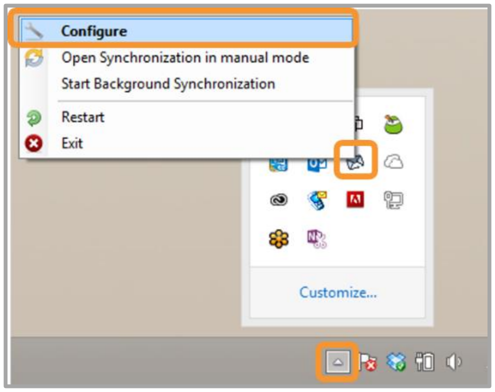
Warning: When switching between Sandbox and Production modes, remember to rebuild history during next synchronization. Otherwise, you may delete your Calendar, Contact, and Task data.

Additional Resources: You can read more about **Rebuilding LinkPoint Connect Sync History** earlier in this User Guide.

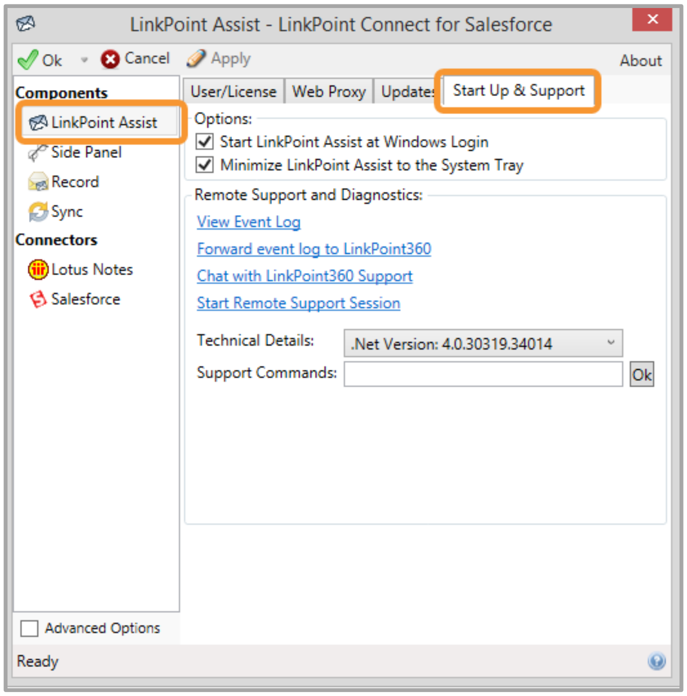
Configuring LinkPoint Connect with a Salesforce Partner Portal

LinkPoint360 customers that use Salesforce Partner Portals, or Communities, can use LinkPoint Connect throughout their organization and their partner network. LinkPoint Connect is configurable for integration with Partner Portals and can be accessed by partners with their individual credentials. Partners can then record email communication that they have with prospects directly to Salesforce without the need to log into the Partner Portal directly. In this section, you will learn how to configure LinkPoint Connect with a Salesforce Partner Portal (Communities) account.

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

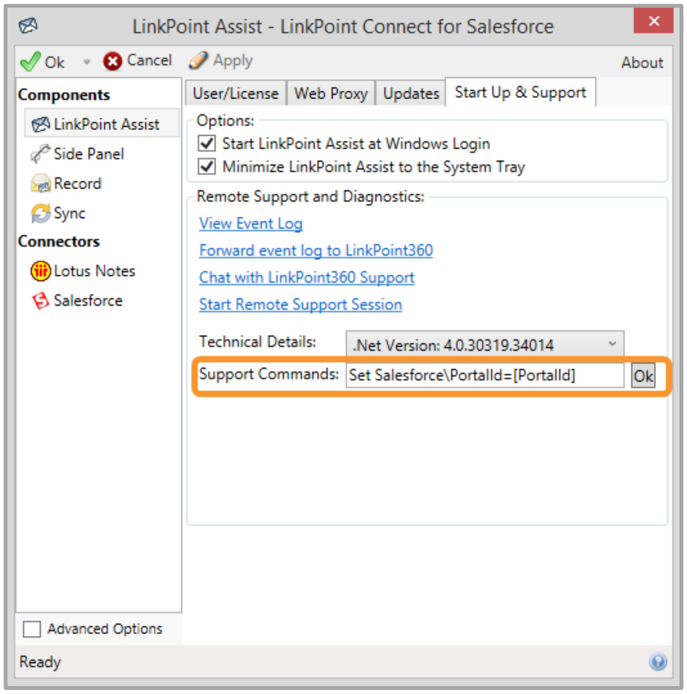


2 Select **LinkPoint Assist** from the **Components** list on the left side of the **LinkPoint Assist** window, and then select the **Start Up & Support** tab.



3

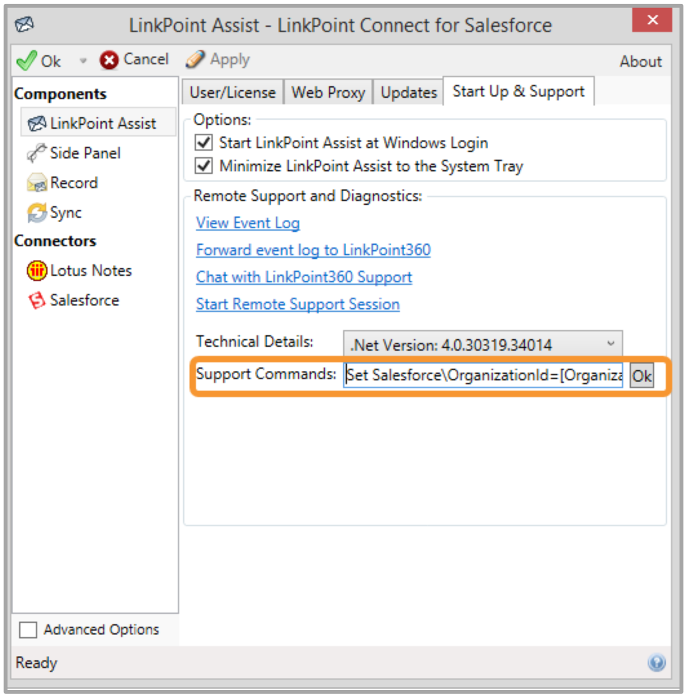
Enter *Set Salesforce\PortalId=[PortalId]* in the **Support Commands** field and click the **Ok** button.



Tip: The **[PortalId]** would represent your Salesforce Portal Id.

4

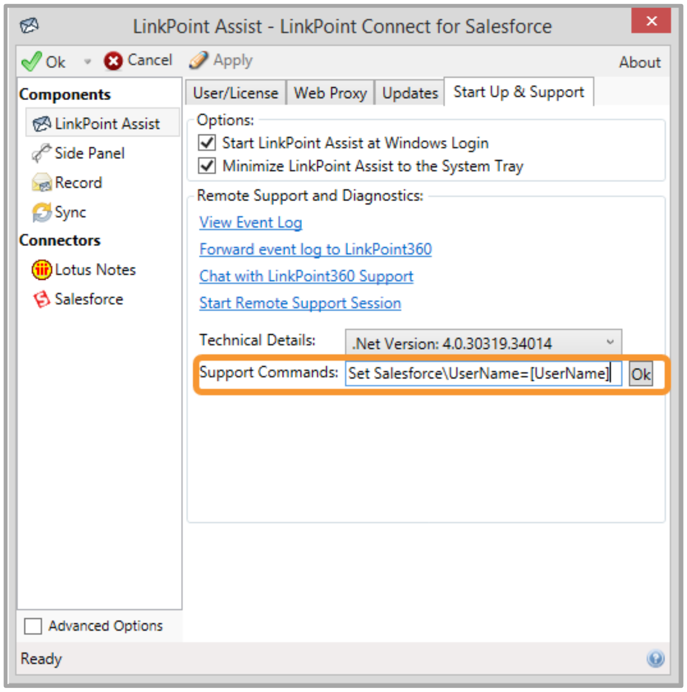
Enter *Set Salesforce\OrganizationId=[OrganizationId]* in the **Support Commands** field and click the **Ok** button.



Tip: The **[OrganizationId]** would represent your Salesforce Organization Id.

5

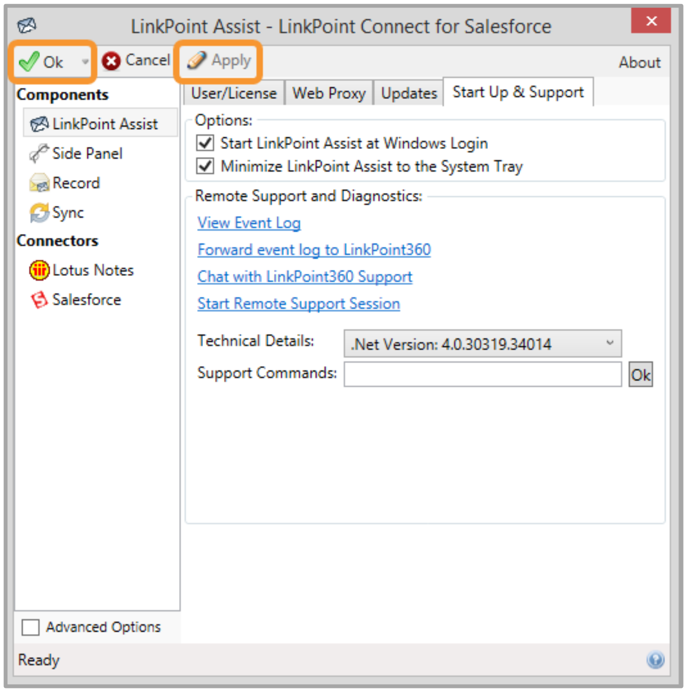
Enter *Set Salesforce\UserName=[UserName]* in the **Support Commands** field and click the **Ok** button.



Tip: The **[UserName]** would represent your Salesforce User Name.

6

Click **Apply** and then click **OK**. Then restart LinkPoint Assist and restart IBM Notes.



Tip: The Portal Id and Organization Id can be found on the URL that is used when logging into the Partner Portal.

Tip: The Salesforce Partner Portal (Communities) does not use OAuth for authentication; therefore, a Salesforce Token may be needed to authenticate with Salesforce. You may need to add the IP address of the Partner Portal User if they are outside the permitted Salesforce IP address ranges.

Reporting with LinkPoint Connect

Viewing LinkPoint Connect Usage Reports in Salesforce

Companies that roll out LinkPoint Connect across their organization realize increased CRM adoption and overall productivity gains. LinkPoint Connect aims to offer customers even greater CRM adoption by providing the ability for managers and admins to track LinkPoint Connect Usage. By being able to see which LinkPoint Connect users are leveraging the tool properly, additional measures can be taken to educate and increase user adoption. In this section, you will learn how to implement LinkPoint Connect Usage Reports.

Warning: The following steps can only be followed by Salesforce users with Admin privileges to create and alter fields within Salesforce and across and organization. Contact your admin for more information.

1. Create a new Date/Time type field named **LinkPointTouchDate__C** within Salesforce. Add this field to Contact, Task, and Event objects.

2. Add the object to all users within the organization for which the usage report will be run. If the field and objects are not applied to the correct users, the data will not be collected.

3. LinkPoint Connect will automatically update this field per user within Salesforce with unique usage data every time the user syncs or records information. This will show the last time LinkPoint Connect was used on an individual level.

4. Create a report within Salesforce that includes the LinkPointTouchDate__C field across the users to be monitored. This will demonstrate usage across teams within the organization.

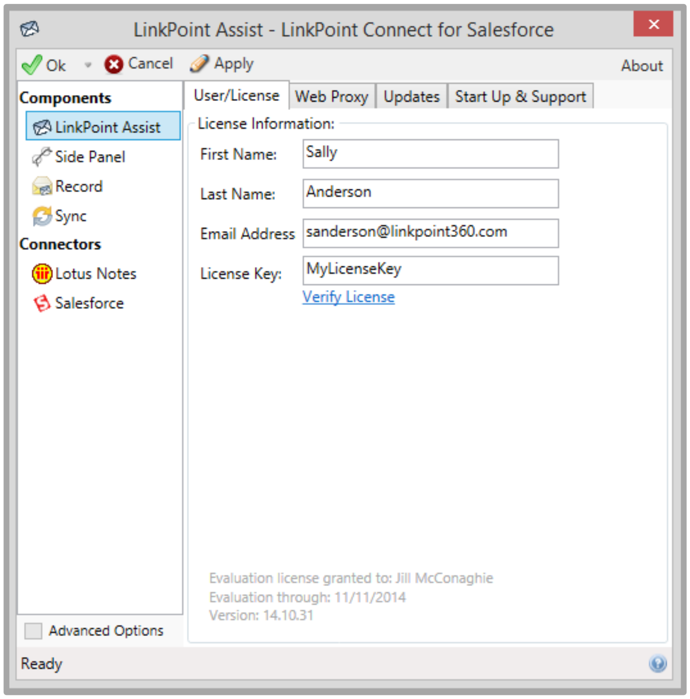
Tip: You do not need to expose the LinkPointTouchDate__C field to end users in order to collect data or run reports. This will prevent data from being overwritten. The field is automatically exposed to the LinkPoint Connect API.

Working with LinkPoint Connect Contextual Help

Finding Knowledge Base Articles within LinkPoint Connect

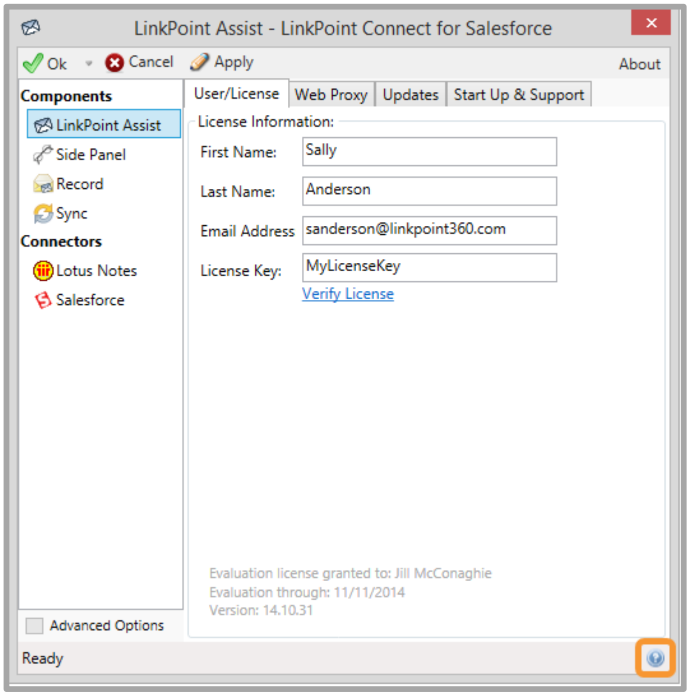
LinkPoint360 offers comprehensive knowledge base articles and help documentation online at www.linkpoint360.com/kb. LinkPoint Connect now includes contextual help links within the software itself. As users view Side Panel details, record emails, or change settings in LinkPoint Assist, they can click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

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

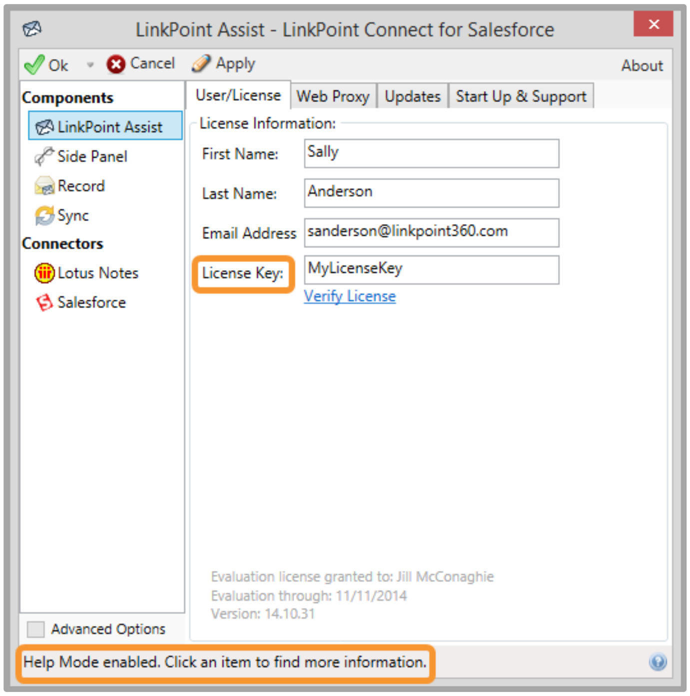


Example: In this example, we will demonstrate Contextual Help using LinkPoint Assist.

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



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



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