

# *LinkPoint for Microsoft CRM*

Lotus Notes Edition



# ***With LinkPoint you can...***

- **Access your Microsoft CRM Contacts as an address book in Lotus Notes.**
- **Record Inbound and Outbound e-mails from Lotus Notes into Microsoft CRM.**
- **Store e-mail attachments in Microsoft CRM.**
- **Attach e-mails to Accounts, Contacts, Opportunities, or Cases.**
- **Synchronized Calendar, Contact and Tasks between Microsoft CRM and Lotus Notes.**

# *Sample LinkPoint Client Base*

ABN-AMRO

Gulfstream Aerospace

The Hartford

TransUnion

Discovery Communications

Panasonic

Deutsche Bank Securities

American Express

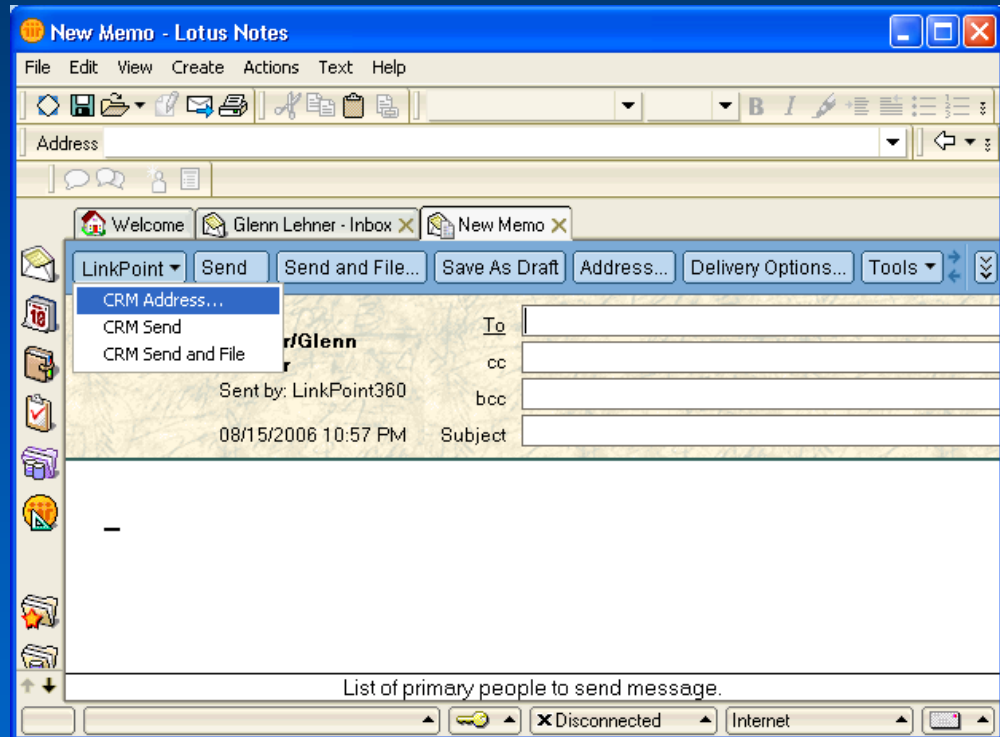
The New York Times Company

Deluxe Corporation

Armstrong World Industries

# LinkPoint e-mail Overview

- You can utilize your Microsoft CRM contacts for addressing by selecting the “CRM Address” menu.
- You can send your e-mail via Lotus Notes and record it to Microsoft CRM by selecting “CRM Send” or “CRM Send and File” menu.



# LinkPoint Addressing

- In the LinkPoint Address form you can search Microsoft CRM for Contacts and use them as recipients in your e-mails.

Select Email Address - LinkPoint360 for Microsoft CRM (Lotus Notes Edition)

Search For:

Search Result: 5

- Dokhgan, Darla
- Dokhgan, Nart
- Lehner, Glenn
- Rose, Brian
- Szabo, Tom

Recipients: 1

To:

cc:

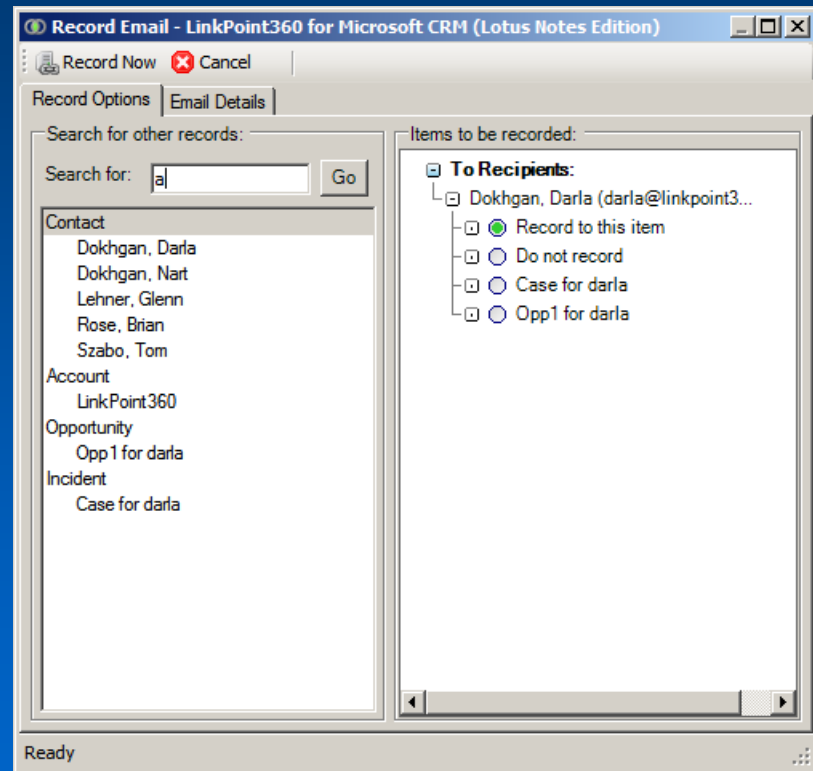
bcc:

Dokhgan, Darla (Contact)  
LinkPoint360  
darla@linkpoint360.com

Ready

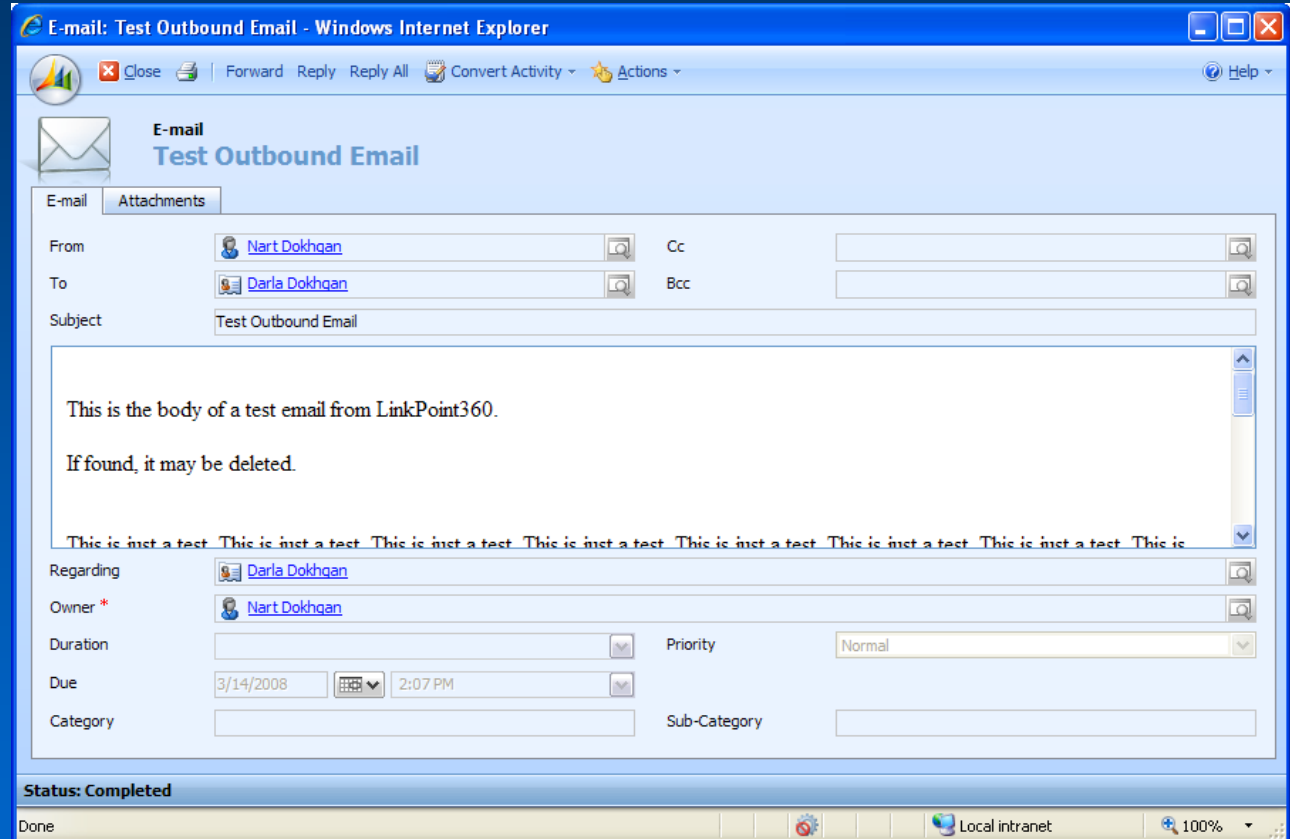
# LinkPoint Record e-mail

- Once your e-mail is complete, you can send it via Lotus Notes and store it in Microsoft CRM.
- You can search and choose to record your e-mail on a business entity in Microsoft CRM. (Account, Contact, Opportunity, or Case)
- If there are attachments, you can select whether to store them in Microsoft CRM.



# Email Recorded in Microsoft CRM

- Once the email has been sent and recorded to Microsoft CRM, the e-mail can be viewed in the “History” list.



# ***LinkPoint Synchronization Capabilities...***

- **Synchronize Calendars, Contacts and Tasks**
- **Either bi-directional or a single direction synchronization.**
- **Synchronization can run either manually or automatically.**

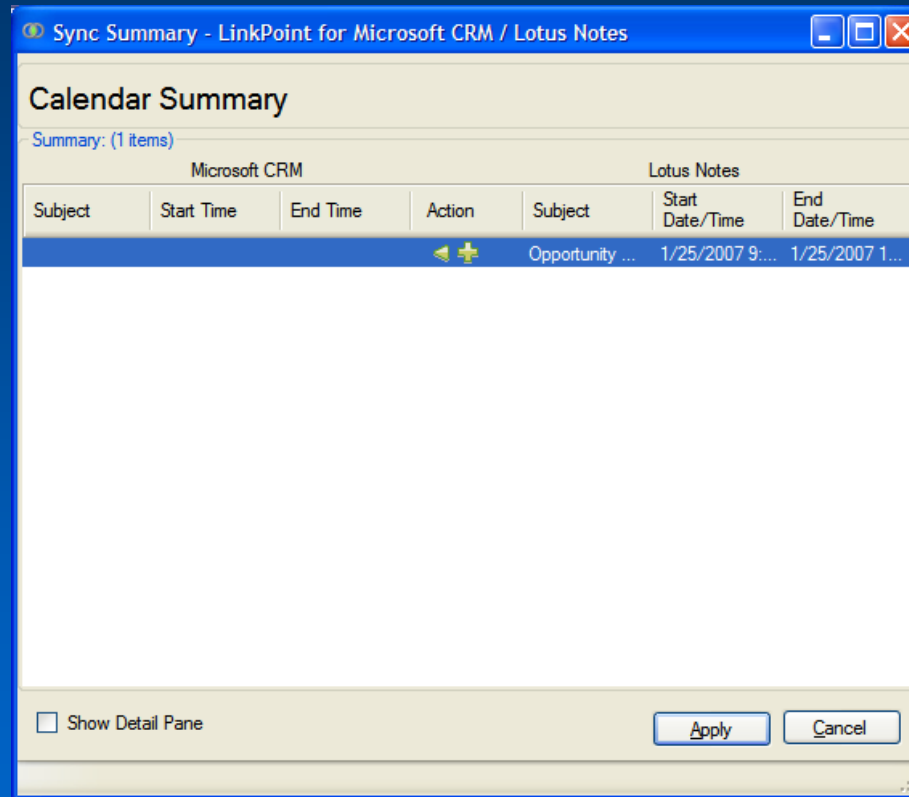
# ***Calendar Synchronization***

- LinkPoint will synchronize all Calendar entries for the past 30 days and 365 future days.
- To prevent private Calendar entries in Lotus Notes from synchronizing to Microsoft CRM, check the “Mark Private” checkbox.

# Calendar Synch Summary

Once LinkPoint evaluates the Calendar entries in both Lotus Notes and Microsoft CRM, if there are any changes, LinkPoint will display the Calendar Summary Screen.

This screen identifies how LinkPoint will synchronize the Calendar entries between the two systems



# *Contact Synchronization*

- LinkPoint synchronizes Contacts from Microsoft CRM in which the user is the owner for.
- LinkPoint only synchronizes Contacts from Lotus Notes that have a category of “CRM”. This prevents any personal contacts in Lotus Notes from being synchronized to Microsoft CRM.

# ***Task Synchronization***

- LinkPoint will synchronize all Task entries for the past 30 days and 365 future days.
- To prevent private Task entries in Lotus Notes from synchronizing to Microsoft CRM, check the “Mark Private” checkbox.

# Questions & Answers

## Why use LinkPoint?

- LinkPoint is integrated into your Lotus Notes software.
- LinkPoint supports Connected and Island Modes in Lotus Notes.

## Is LinkPoint installed on the Domino Server or user Workstation?

- LinkPoint is installed only on the user's workstation and only requires a mail template change if the organization chooses.

## What are the LinkPoint Requirements?

- Lotus Notes Release 5.05 or greater.
- Microsoft CRM Release 3.0 or greater.

## What business entities in Microsoft CRM can I record to?

- Account, Contact, Opportunity, or Case.

# ***Contact Information***

LinkPoint360

64A White Street

Red Bank, New Jersey 07701

Sales: 732-212-8401

Support: 732-212-8403

E-mail: [info@LinkPoint360.com](mailto:info@LinkPoint360.com)

URL: <http://www.linkpoint360.com/>