

# SuperOffice CRM 6 Notes Mail Link

The SuperOffice CRM 6 Notes Mail Link will add new functions to the Notes Mail Inbox, making it able to work together with SuperOffice CRM 6 in a very efficient way. In addition to providing a solid and user-friendly integration to Notes Mail, the CRM 6 Notes Mail Link can also be used to integrate data from Lotus Notes/Domino databases.

For certain categories of SuperOffice CRM 6 users, the kind of integration this Link offers will provide a very convenient workflow connected to writing, reading and storing of e-mails. By setting options, the user may decide, among other things which e-mails to be stored and when to be deleted. The scenarios below describe the main features and workflow when working with SuperOffice CRM 6 and the Notes Mail Link:

## You can store e-mails directly from the Notes Mail Inbox into SuperOffice CRM 6

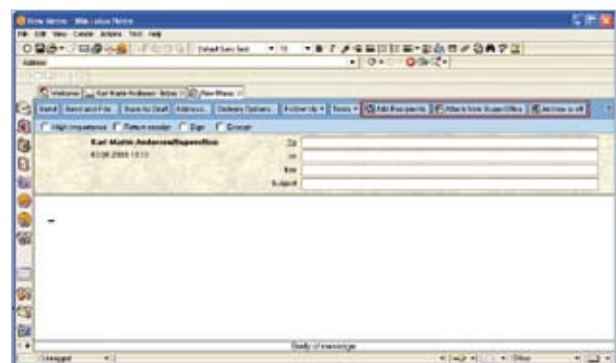
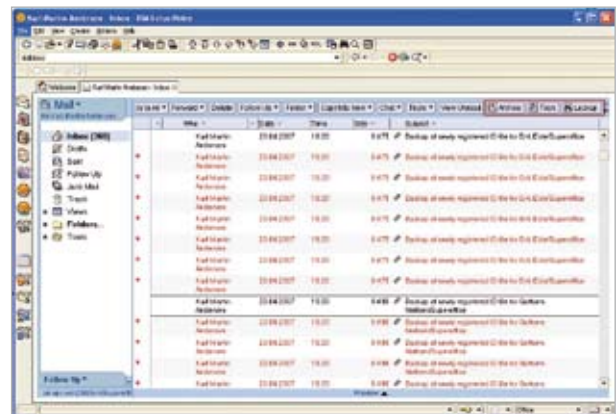
Select one or several e-mail(s) in the Notes Mail Inbox and press the new button "archive in CRM 6". The selected email(s) will be sent to CRM 6. The sender's e-mail address will be used as the key and the mail will automatically be stored on the corresponding contact card and contact person. If you are more interested in an attached document than the e-mail itself, you are also able to store the attachment directly as a document in SuperOffice CRM 6. You may also store an email as a task directly in CRM 6. You can create and send e-mail directly from Notes Mail. The e-mail will automatically be stored in SuperOffice CRM 6, provided you are using an e-mail address that is found on a contact person in the CRM 6 database. This function can be turned on and off by the individual user.

## You can still use the built-in e-mail functions in SuperOffice CRM 6

The built-in e-mail functions in SuperOffice CRM 6 can still be used for selecting contact persons and creating new mails. The same applies to the functions Reply and Forward initiated from CRM 6 activity list. Selecting "e-mail" in the CRM 6 navigator will take you directly to the Notes Mail Inbox.

## Integration of databases

The contact database is the quintessential feature of SuperOffice CRM 6, with its intuitive way of retrieving information linked to a contact, regardless of what type of contact. You can use CRM 6 to create any document you normally use your standard application to create, in this case Lotus SmartSuite. The documents will automatically be saved in Lotus Notes and can be retrieved both from CRM 6 and Notes. When you create a new document, all necessary data will automatically be transferred from CRM 6.



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SuperOffice CRM 6 Notes Mail Link is a module to SuperOffice CRM 6 for Windows.

### Installation

..is simple. The installation program for the Notes Mail Link guides you through the whole process, and when it is finished, all your Notes forms from all your Notes databases are linked to CRM 6 forms. And you are ready to go.

### About Lotus Notes – for CRM 6 users

Lotus Notes is the leading document and processing tool within the groupware area (archiving, retrieving and distributing documents). By the fact that a case may be monitored from the beginning until the end, solutions and applications developed with the use of Lotus Notes, Lotus Notes supports the different processes in the organization. A whole range of useful applications are available for Lotus Notes through third party suppliers all around the globe. These may solve company specific needs, such as contract databases, quality assurance systems, workflow and service systems.

### System requirements

The SuperOffice Notes Mail Link requires:

- Notes/Domino version 5.02b or–higher with a full 32-bit Notes client installed on each computer.
- SuperOffice CRM 6 (release 6.0.x or higher).

Preparing the Notes Mail Link for storing incoming mails involves the following modifications of the Notes installation:

- A new Notes database (public mail) must be established.
- New buttons will be added to the Notes mail form (archivein SuperOffice).

Installation has to be done by a Notes competent person.

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