



## Step-by-Step Guide to Configuration

The **ConnectIT-MSCRM Configuration** utility provides a way to check or change the various settings the **ConnectIT-MSCRM** software uses when linking to **Opportunities** in **Microsoft CRM**. To open the **ConnectIT-MSCRM Configuration** application, browse to the **Start | All Programs | ConnectIT** menu and click the **ConnectIT-MSCRM Configuration** option.

**General Note:** The Opportunity must already exist in Microsoft CRM before a QuoteWerks document can be linked to it. If you want to create a new Opportunity then you can just use the standard QuoteWerks option on the Save document dialog. Pressing the QuoteWerks Save button or menu option will automatically create a new MSCRM Opportunity if one does not already exist.



## MSCRM Settings

The Microsoft **CRM** tab enables the connection to **Microsoft CRM SQL Server** to be set up and tested.

ConnectIT-MSCRM Configuration Settings

MSCRM | QuoteWerks | Advanced

MSCRM SQL Server Settings

SQL Server Host Name: 192.168.0.1

SQL Server Database Name: My\_Company\_MSCRM

Connection Time Out: 15

Test Connection

Opportunity Settings

Naming Convention: Rename the MSCRM Opportunity

Override the Opportunity Estimated Revenue with the QuoteWerks Sub Total:  Field: SubTotal

Save Close

1. Enter the **SQL Server Host Name**, **SQL Server Database Name** and an appropriate number of seconds for the **Connection Time Out**.

**Note:** by default, the **Connection Time Out** is 15 seconds. If timeout errors occur, increase this number.

2. Click the **Test Connection** button to check that the settings are correct.

**Note:** On successful configuration, you will receive the message "Connection to the MSCRM SQL Server database tested ok!" If you do not receive this message, please check the details and try again.

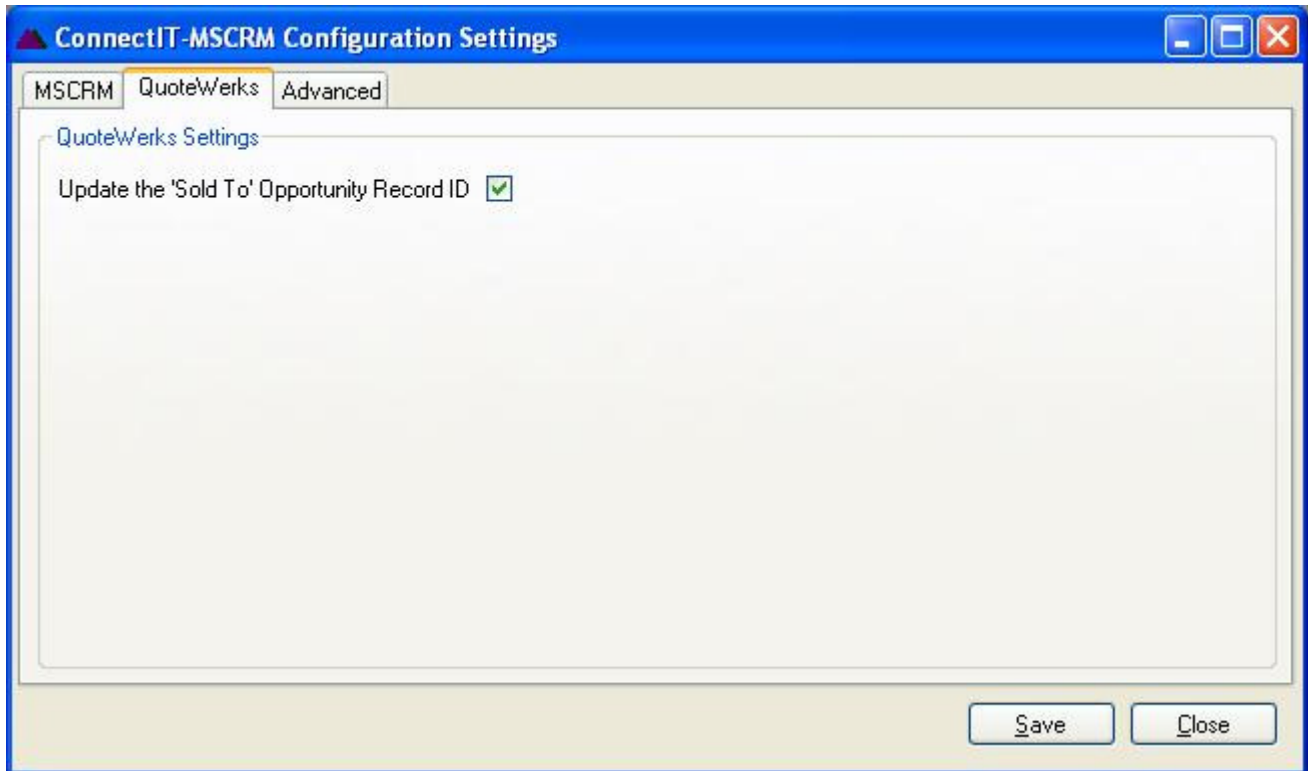
3. **QuoteWerks** integration with **MSCRM** relies on the naming of the **MSCRM Opportunity** so **ConnectIT-MSCRM** allows you set the naming convention you would like to keep. The options available are **Rename the MSCRM Opportunity**, **Rename the QuoteWerks Document** or **Give the Opportunity and Document a new name**.
4. The **Estimated Revenue** is a field on the **MSCRM Opportunity** and is either **System Calculated** or **User Provided**; please see your **Microsoft CRM** user guide for more information. By ticking the **Override the Opportunity Estimated Revenue with the QuoteWerks Subtotal**, when **ConnectIT-MSCRM** links the **QuoteWerks Document** to the **Microsoft CRM Opportunity**, **ConnectIT-MSCRM** will set the **Opportunity Estimated Revenue** as **User Specified**.
5. With the **Override the Opportunity Estimated Revenue with the QuoteWerks Subtotal** ticked, the additional **Field** selection is available. This allows selection of with the **QuoteWerks Document Sub Total** or **Profit Amount** to be used to update the **Opportunity Estimated Revenue** value.

**Note:** the **Field** selected should match the option chosen when configuring the **MSCRM / QuoteWerks** link. See the **QuoteWerks Contacts** menu | **Setup Contact Manager** | **MS CRM** option and **QuoteWerks User Guide** for more information – we would recommend that if the "Use Profit Amount vs Sale Amount as opportunity amount" is ticked then **Field** should be set to **ProfitAmount**, otherwise select **SubTotal**.





## QuoteWerks Settings

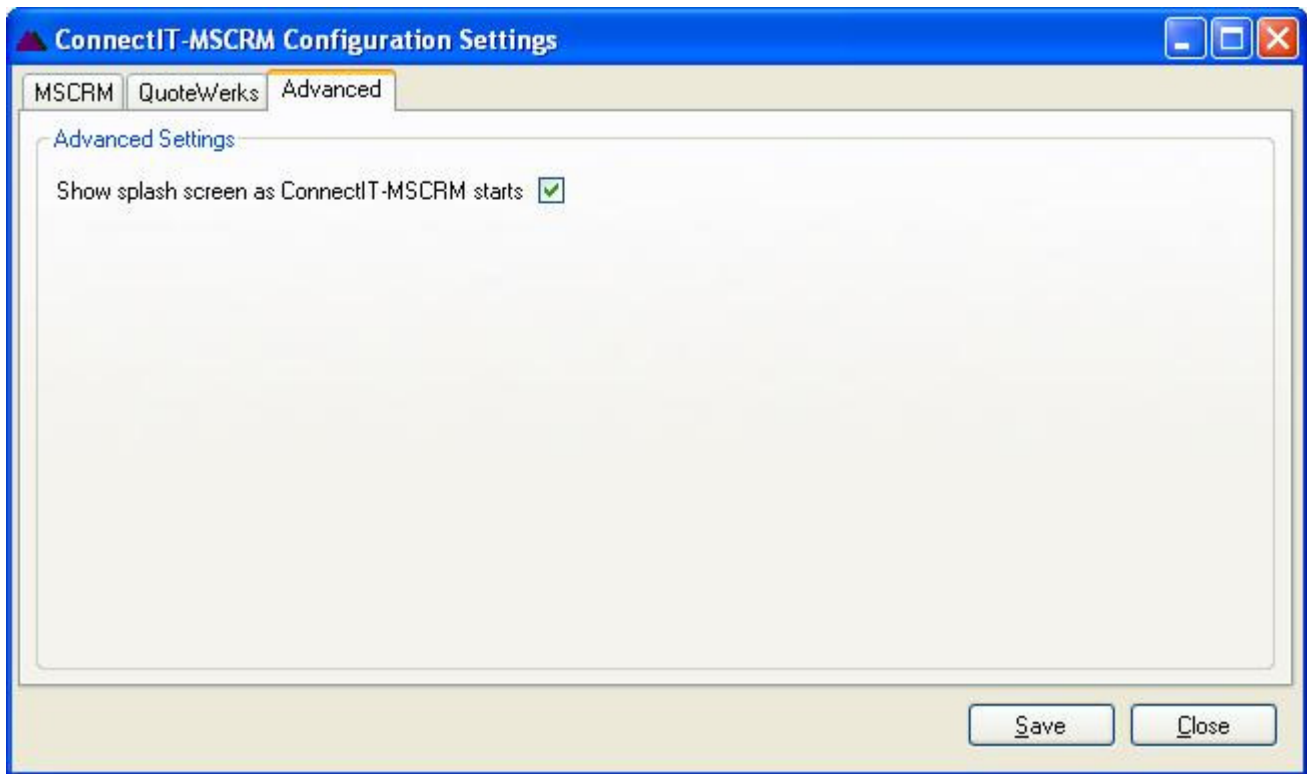


1. By default, the **Update the 'Sold To' Opportunity Record ID** checkbox is ticked. This refers to a identifier held in the **QuoteWerks** database. **QuoteWerks** does not currently support usage of the **Sold To Opportunity Record ID** field; this options has been included for future compatibility

**Note: it may also be possible to create reports (using third reporting tools) which reference this ID between the QuoteWerks and MSCRM databases.**

## Advance Settings

The **Advanced** tab offers various options for the way the **ConnectIT-MSCRM** functions.



1. By default, the **ConnectIT-MSCRM** splash screen is shown as the application initialises. If you would like to hide the splash screen, clear the checkbox.