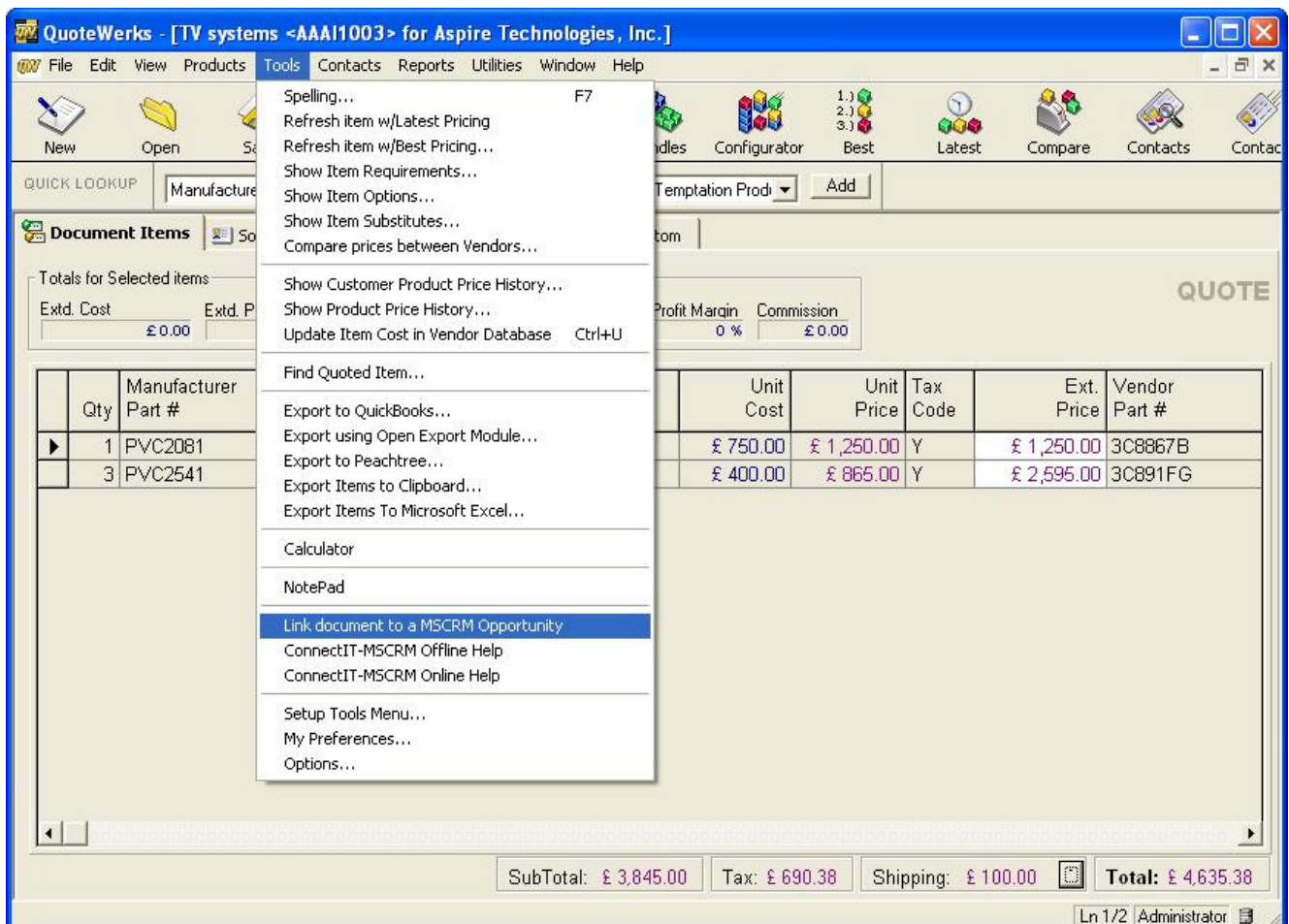


Step-by-Step Guide to Linking Opportunities

The **ConnectIT-MS CRM** utility provides a way to link documents in **QuoteWerks** to existing **Opportunities** in **Microsoft CRM**. In order to do this, an **Opportunity** must first exist in **Microsoft CRM**. The **Opportunity** needs to have a **Topic** and a **Contact** needs to be assigned as a potential customer.

To start the **ConnectIT-MS CRM** application, you should use the **Link to Microsoft CRM Opportunity** option from the **QuoteWerks |Tools** menu.



The screenshot shows the QuoteWerks application window titled "QuoteWerks - [TV systems <AAA11003> for Aspire Technologies, Inc.]". The "Tools" menu is open, displaying various options. The option "Link document to a MSCRM Opportunity" is highlighted in blue. Other visible options include "Spelling...", "Refresh item w/Latest Pricing", "Show Item Requirements...", "Compare prices between Vendors...", "Find Quoted Item...", "Export to QuickBooks...", "Calculator", "NotePad", "ConnectIT-MSCRM Offline Help", and "ConnectIT-MSCRM Online Help".

The main window displays a "QUOTE" form with a table of items. The table has columns for Qty, Manufacturer Part #, Unit Cost, Unit Price, Tax Code, Ext. Price, and Vendor Part #.

Qty	Manufacturer Part #	Unit Cost	Unit Price	Tax Code	Ext. Price	Vendor Part #
1	PVC2081	£ 750.00	£ 1,250.00	Y	£ 1,250.00	3C8867B
3	PVC2541	£ 400.00	£ 865.00	Y	£ 2,595.00	3C891FG

At the bottom of the window, the summary fields are: SubTotal: £ 3,845.00, Tax: £ 690.38, Shipping: £ 100.00, and Total: £ 4,635.38. The status bar shows "Ln 1/2 | Administrator".

Link To MSCRM Opportunity

QuoteWerks Document Details

Document Number: AAAI1003 Document Name: TV systems

MSCRM Opportunity List Filters

Account: Aspire Technologies, Inc. Created Date: 08/10/2007 08/10/2007 [Refresh]

Contact: John Lewie Estimated Close Date: 08/10/2007 08/10/2007 [Refresh]

MSCRM Opportunity Details

New Name: October conference 2007 6433af53-41ab-dc11-b64e-0003ff217bb0

Probability: 50 Estimated Close Date: 17/12/2007 [Refresh]

	Name	Description	Est. Close Date	Est. Value	Close Prob.
	TV systems emailer - Aug 2007	Emailer reported as read.		£1,500.00	10.0%
	TV Systems emailer - Sep 2007	Contact responded with request...		£1,500.00	25.0%
▶	October conference 2007	Contact came onto stand specif...	17/12/2007 08:00	£4,000.00	50.0%

[Select] [Close]

The top part of the **Link to MSCRM Opportunity** screen displays information about the current active document open in **QuoteWerks**.

1. To help find the **MSCRM Opportunity** you would like to link the **QuoteWerks Document**, use the **Created Date** and **Estimated Close Date** selections and **Refresh** buttons to filter the list of **MSCRM Opportunities** listed on the grid.

Note: only Active MSCRM Opportunities are listed.

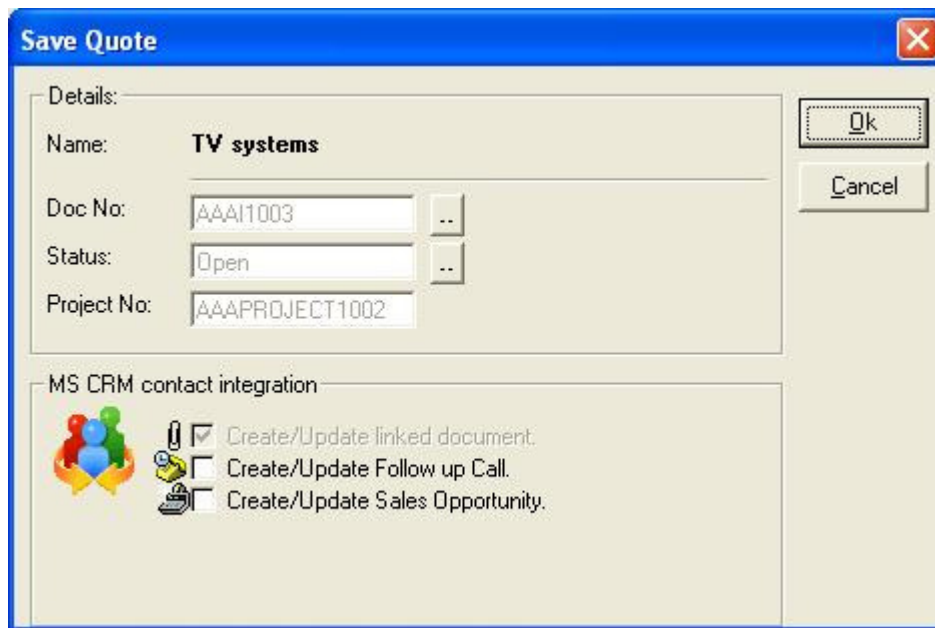
2. Highlight the **MSCRM Opportunity** on the grid that you would like to link to the **QuoteWerks Document**. To see the **MSCRM Opportunity Description** details, double click the appropriate row.



- As you change the selected **MSCRM Opportunity** on the grid, the **New Name***, **Close Probability** and **Estimated Close Date** will change. If you would like to change these values, then they can simply be overtyped.

* **Note:** the New Name field may or may not be editable, depending on the Naming Convention setting in ConnectIT-MSCRM Configuration.

- Press the select button to link the selected **MSCRM Opportunity** to the current active **Document** in **QuoteWerks**. The **QuoteWerks Document** will now be linked to the selected **MSCRM Opportunity**. You can now press the **Save** button in **QuoteWerks** to use the **QuoteWerks / MSCRM** integration to create a **Follow up Call**.



Save Quote

Details:


Name: **TV systems**


Doc No: AAA11003 ..


Status: Open ..

Project No: AAAPROJECT1002

MS CRM contact integration

 Create/Update linked document.

 Create/Update Follow up Call.

 Create/Update Sales Opportunity.

Ok

Cancel