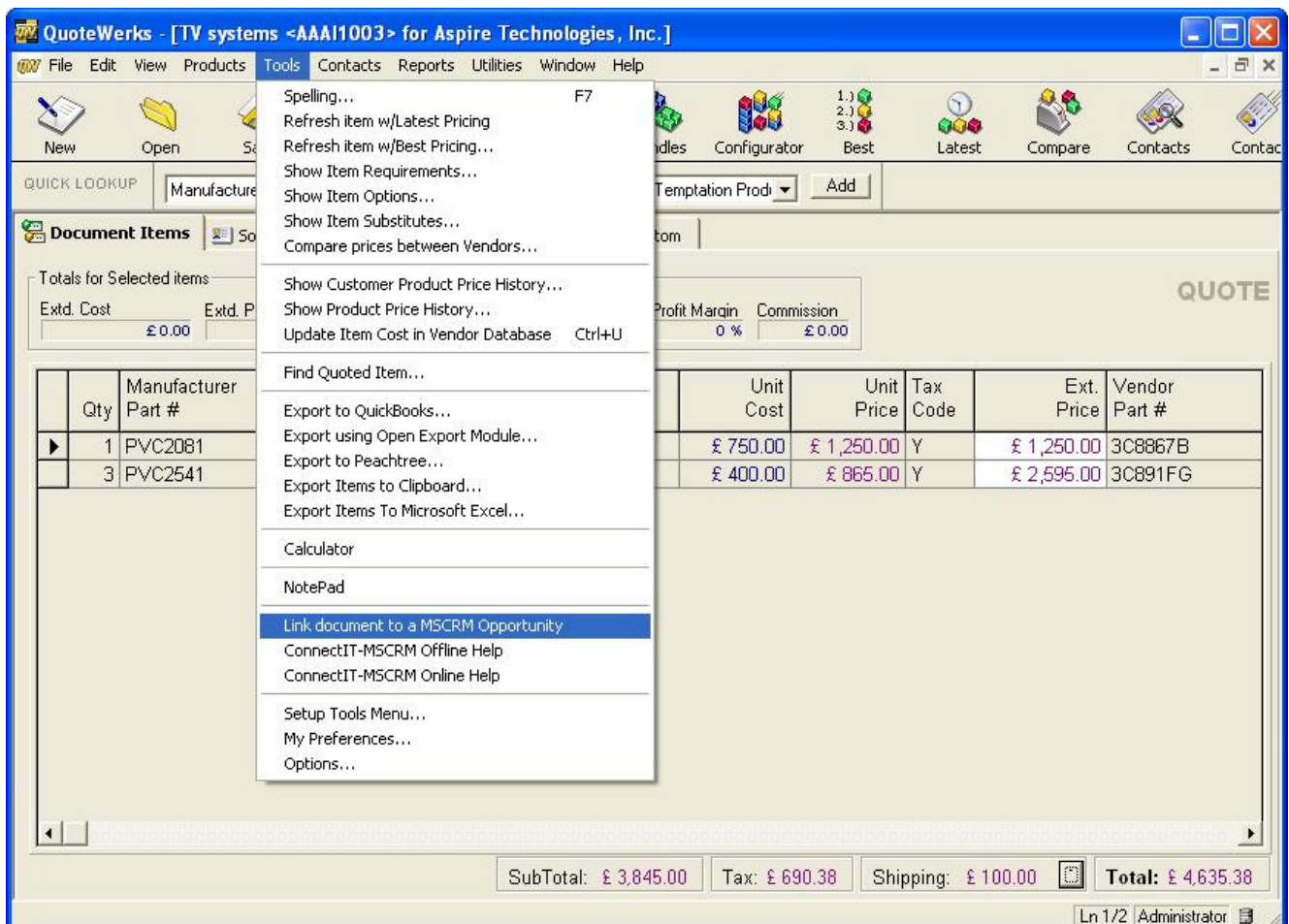# Step-by-Step Guide to Linking Opportunities

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 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.

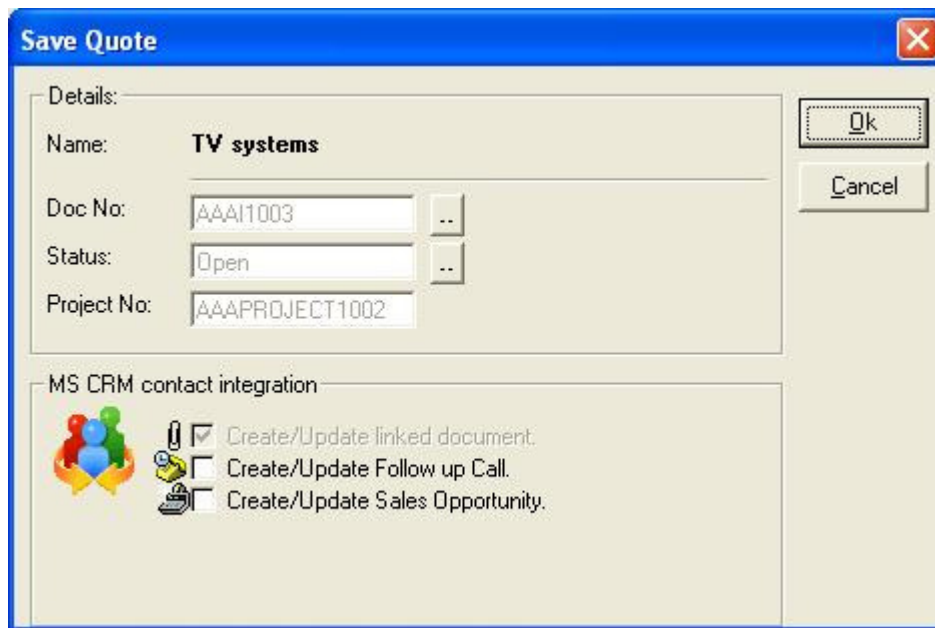   Note: only Active MSCRM Opportunities are listed.

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.

3. 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.

4. 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**.