




CRM INTEGRATION MATRIX

	ACT! (version: 4.0)	ACT! (versions: 5.0, 6.0)	ACT! (versions: 2005, 2006, 2007, 2008, 2009, 2010)	ACT! For Web (version: 2010) Requires QuoteWerks Corporate Edition	Goldmine (versions: 4.0, 5.0, 5.5, 5.7, FrontOffice 2000, 6.0, 6.5, 6.6, 6.7, 7.0 - Standard and Corporate, 8.0, 8.5 - Premium)	Maximizer (versions: 97, 5.0, 2000, 6.0, 7.0, 8.0, 9.0, and 10.0)	MS CRM (versions 1.2, 3.0 and 4.0) Requires QuoteWerks Corporate Edition	Outlook (versions: 97, 98, 2000, XP, 2003, and 2007)	Outlook BCM (version: 2007)	Peachtree* (versions: 2006, 2007, 2008, 2009, 2010)	Quickbooks (versions: Pro/Premier/Enterprise 2002-2010 for the US; Pro/Premier/Enterprise 2003-2010 for Canada; Pro/Accountant 2005-2007 for the UK, & Pro/Accountant 2005 for Asia Pacific)	Salesforce.com (versions: Professional and Enterprise)	SalesLogix (versions: 5.0, 5.2, 6.0, 6.1)	SalesLogix (versions: 6.2, 7.0, 7.2, and 7.5)	SugarCRM (versions: 5.1, 5.2, and 5.5 including Community, Express, Professional, and Enterprise)
QuoteWerks 4.5 Edition	All	All	All	Corporate	All	All	Corporate	All	All	Professional or Corporate	Professional or Corporate	All	All	Corporate	All
Pulls current contact info into Ship To/Sold To/Bill To	✓	✓	✓		✓	✓		✓	✓				✓	✓	✓
Search the contact database for contacts to add to the Ship To/Sold To/Bill To fields			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Creates Linked Document Attachment for Quote in CRM	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓
Creates/Updates Opportunities	✓	✓	✓	✓	✓		✓		✓			✓		✓	✓
Writes line item details into Opportunity			✓	✓					✓						
Closes Opportunities	✓	✓	✓	✓	✓		✓		✓			✓		✓	✓
Creates Follow-Up Calls	✓	✓	✓	✓	✓		✓	✓	✓					✓	✓
Can pull additional CRM field data into QuoteWerks	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓ (w/ web connector)		✓	✓
Can print additional fields from CRM onto QW layouts	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓
Can pull lookup list (F2) info from CRM into QW	✓	✓	✓	✓	✓		✓	✓	✓	✓		✓		✓	✓
Logs E-mails sent in QW in CRM record	✓	✓	✓	✓	✓	✓		✓	✓						
Creates Profile/ Detail Record					✓										
Can utilize CRM sync functionality		✓	✓	✓	✓		✓	✓				✓	✓	✓	✓
Creates/Updates Meetings	✓	✓	✓	✓											
Creates/Updates To-Dos	✓	✓	✓	✓											
Creates Quote/Estimate w/ Line Item detail							✓ (4.0 Only)			✓	✓				
Launch CRM Contact from within QuoteWerks				✓			✓ (4.0 Only)								

Last Updated for QuoteWerks 4.5 Build 1, which was released December 15th 2009.

For full details on the integrations see the QuoteWerks website at: <http://www.quotewerks.com/cmfaq.asp>

* For accounting integrations, see <http://www.quotewerks.com/peachfaq.asp> for supported versions.

 Denotes not available in CRM software.