


|  CRM INTEGRATION MATRIX | ACT! (versions: v17, v16, 2013, 2012, 2011, 2010, 2009, 2008, 2007, 2006, 2005) | ACT! For Web (versions: v17, v16, 2013, 2012, 2011, 2010) | Autotask: (all editions) | ConnectWise (versions: 2015.5 back to 2011.2, cloud and on-premise) | Goldmine (versions: 2014.2, 2014.1 [Premium] 2013.1 [Premium], 9.x, 8.5, 8.0 [Premium]; 7.5, 7.0 [Standard & Corporate], 6.7, 6.6, 6.5, 6.0, FrontOffice 2000, 5.7, 5.5, 5.0, 4.0) | Google Contacts | Maximizer (versions: 13.1, 13.0, 12.3, 12.2, 12.1, 12, 11.0, 10.5, 10.0, 9.0, 8.0, 7.0, 6.0, 2000, 5.0, 97) | MS CRM (versions 2015 (v7.1), 2014 (v6.1), 2013 (v6.0), 2011 (v5.0), 4.0 + CRM Online (Passport/Live IDs + MS Office 365 Logins) | Outlook (versions: 2013, 2010, 2007, 2003, XP, 2000, 98, 97) | Outlook BCM (version: 2010, 2007) | Sage 50* (versions: 2016, 2015, 2014, 2013, 2012, 2011, 2010, 2009, 2008, 2007, 2006) | QuickBooks* (versions [†]) | Salesforce.com (versions: Professional, Enterprise, and Unlimited) | SalesLogix (versions: 6.1, 6.0, 5.2, 5.0) | SalesLogix (versions: 8.1, 8.0, 7.5, 7.2, 7.0, 6.2) | SugarCRM (versions: 7.5, 7.2, 7.1, 7.0, 6.7, 6.6, 6.5, 6.4, 6.3, 6.2, 6.1, 6.0, 5.5, 5.2, 5.1 Community, Express, Professional & Enterprise) |
|--|---|---|------------------------------------|---|--|------------------------|---|--|--|---|---|--|--|---|---|--|
| QuoteWerks Edition | All | Corporate | Corporate | Corporate | All | All | All | Corporate | All | All | Professional or Corporate | Professional or Corporate | All | All | Corporate | All |
| Creates new company/account in CRM from info typed into QW Sold To/Ship To tab | | | | ✓ | | | | ✓ | | | | | ✓ | | | |
| 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 | ✓ | ✓ | ✓ | ✓ | ✓ | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | | ✓ | ✓ |
| 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 | | | ✓ | | | | | ✓ | | | ✓ | ✓ | | | | |
| Launch CRM Contact from within QuoteWerks | ✓ | ✓ | ✓ | ✓ | ✓ | | | ✓ | | | | | ✓ | | | |
| Links to CRM as a Product Data Source | | | ✓ | ✓ | | | | | | | ✓ | ✓ | ✓ | | | |
| Creates Auto-Links to Contacts in CRM/PSA | | ✓ | ✓ | ✓ | ✓ | | | ✓ | | | | | ✓ | | | |
| Creates Auto-Links to Opportunity in CRM/PSA | | | ✓ | ✓ | | | | ✓ | | | | | ✓ | | | |
| Creates Auto-Links to Activities/Calls in CRM/PSA | | | | ✓ | | | | ✓ | | | | | | | | |
| Creates Auto-Links to Tickets in PSA | | | | ✓ | | | | | | | | | | | | |

Last Updated for QuoteWerks 5.0 Build 4.4, which was released 06/01/2015

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

* For accounting integrations, see more details here: <http://www.quotewerks.com/accountfaq.asp>

† Quickbooks Versions: Pro/Premier/Enterprise 2015-2003 for the US; Pro/Premier/Enterprise 2015-2003 for Canada; Pro/Accountant 2014-2005 for the UK, & Pro/Accountant 2011-2005 for Asia Pacific)