

Sage CRM



QuoteWerks
The way quoting should be...

QuoteWerks integration with Sage CRM

Now combine the best CRM solution with the most popular quoting solution!

Our integration between Sage CRM and QuoteWerks gives you the ability to launch QuoteWerks directly from the Sage CRM interface, passing with it the details of the current company and/or contact you have in front of you. Additional fields can be mapped from Sage CRM to custom fields in QuoteWerks to bring over other information like Salesperson's Name, Pricing Profiles of the Customer etc. Additional contact information for shipping and billing addresses can be accessed from the QuoteWerks interface, accessing the contact information directly from the Sage CRM database.

All saved quotations can be viewed within the Sage CRM interface and will be displayed relative to the current company or opportunity. Previously saved quotations can be accessed by clicking on a hyperlink in Sage CRM, which will open the quote with QuoteWerks.

Summary

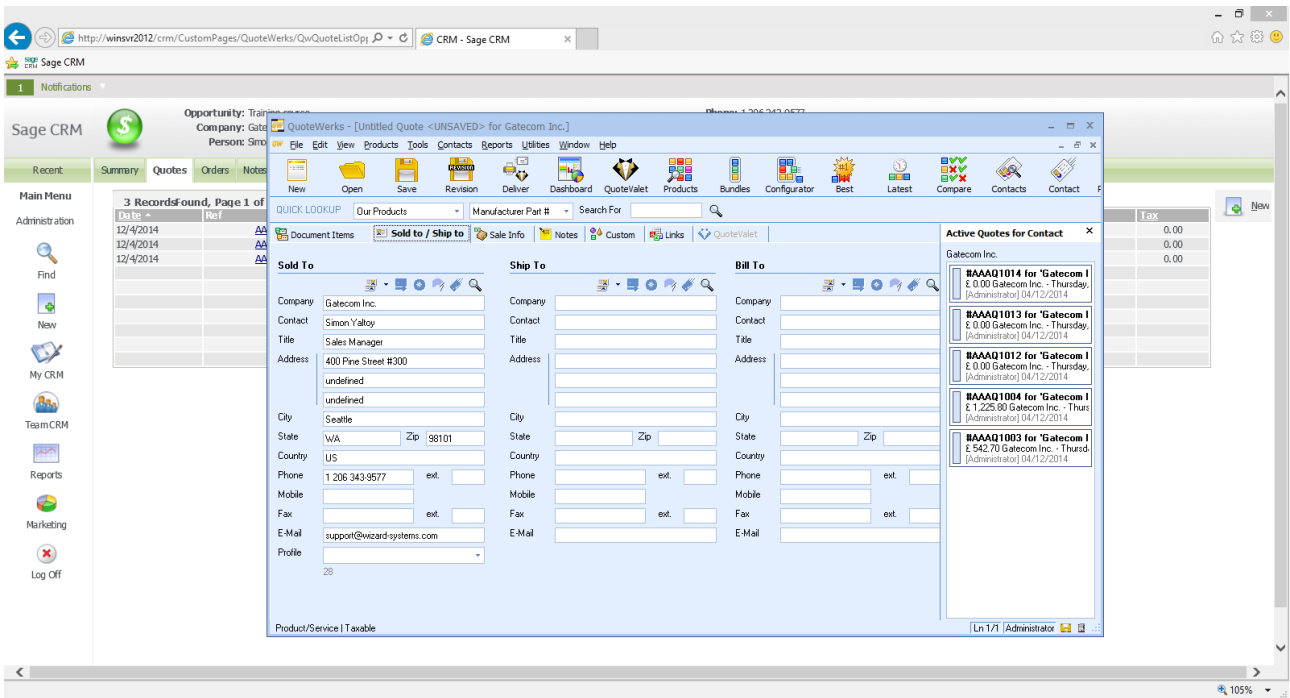
- Create new quotes directly from Sage CRM.
- Create quotations linked to Sage CRM Opportunities.
- Access the Sage CRM contact information for shipping and billing address details.
- Search your Sage CRM database from QuoteWerks
- Display quotation summary information in the Sage CRM interface.
- Launch previous QuoteWerks quotations from Sage CRM and open them in QuoteWerks for editing.
- See latest quote revisions in Sage CRM

Improve Workflow
Capture More Revenue

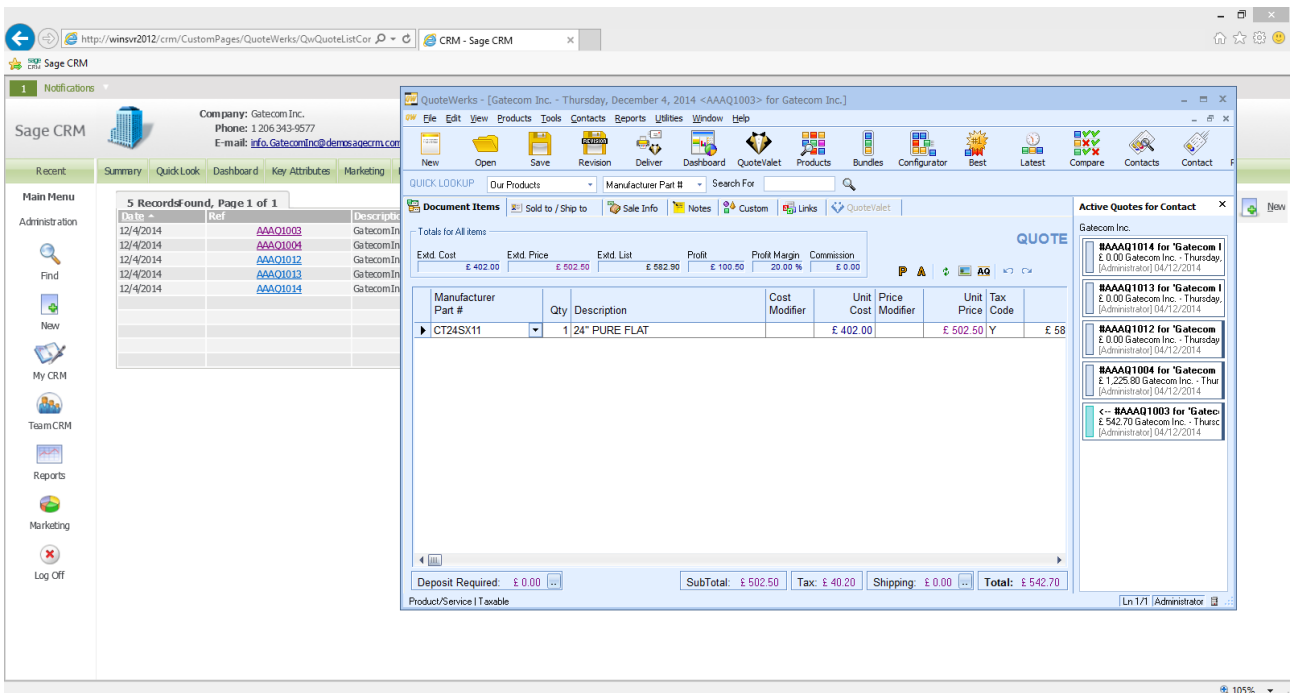
QuoteWerks

sage

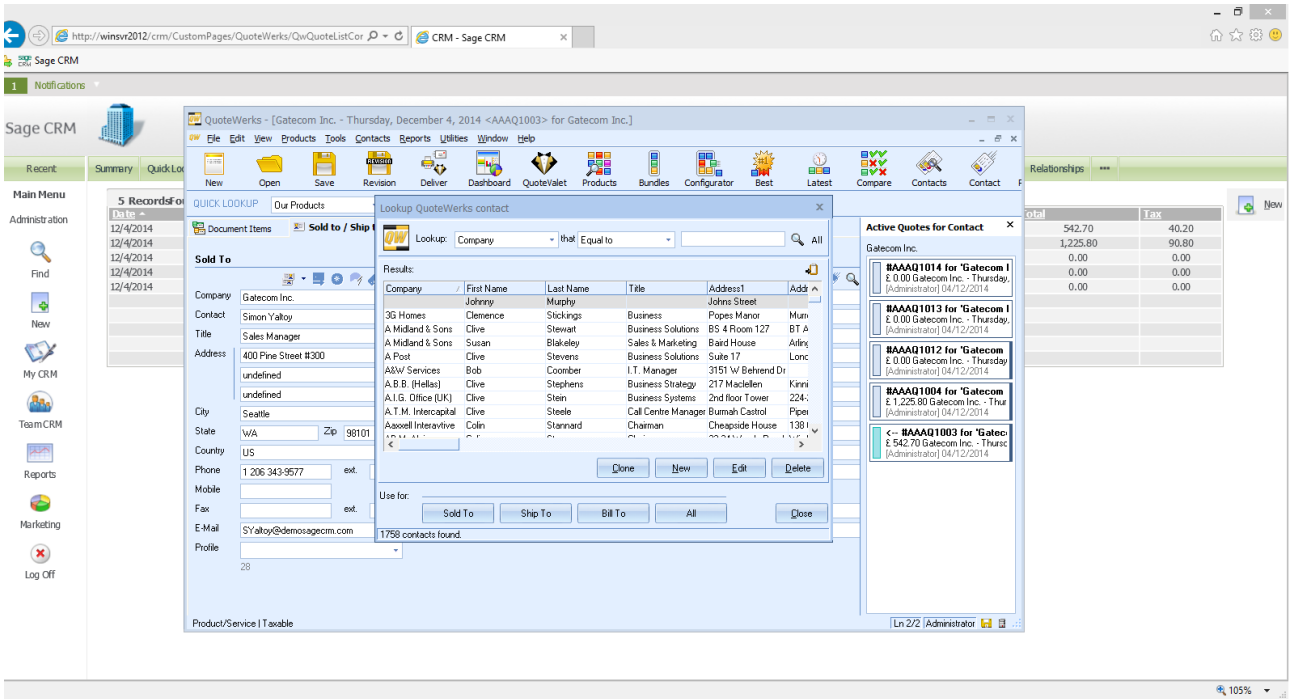
Here are some screenshots...



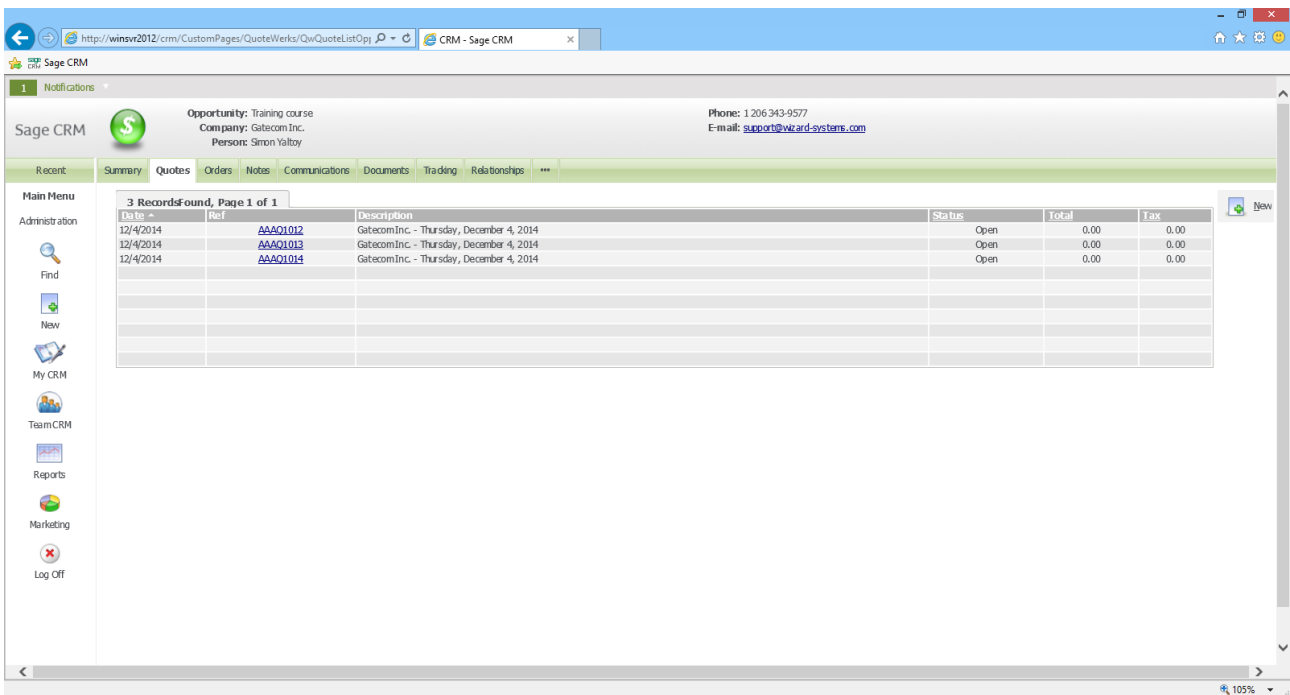
Create a New Quote in QuoteWerk from Sage CRM (see that New button in the top right corner?)



See all previous Quotes to this Customer in Sage CRM



Search Sage CRM from QuoteWerks when selecting Contact details for a Quote



See all Quotes against an Opportunity in Sage CRM (and against the Company/Organisation record also!)

Date	Ref	Description	Status	Total	Tax
12/4/2014	AAA01001	Gatecom Inc. - 04 December 2014	Open	818.10	60.60

If you're a QuoteWerks User, you will know that you can convert Quotes to Orders. See all Orders on its own Tab/Screen in Sage CRM.

Requirements

The QuoteWerks – Sage CRM link is designed to work with the 'on premise' version of Sage CRM, 7.2 or above. It will also work with all Editions of QuoteWerks (version 4.9 or above), but the fastest performance will be with QuoteWerks Corporate Edition on SQL. We strongly recommend SQL because your Sage CRM will be hosted on that database also.

About Wizard Systems

Since 2000, Wizard Systems have been supplying Sage CRM and QuoteWerks solutions. We are an Authorised Partner for both applications. Wizard Systems are the developers of the link and supply this Worldwide.

For Pricing and availability, please contact Wizard Systems at +44 (0) 1454 316800 or email wizard1@wizard-systems.com.