

QuoteWerks CRM/PSA INTEGRATION MATRIX (Click link for version support)	ACT!	Act! for Web	Autotask	ConnectWise	Goldmine	Google Contacts	HaloPSA	HubSpot CRM	Kaseya BMS	Maximizer Desktop	MS Dynamics CRM	Outlook	Sage 50	QuickBooks Desktop	QuickBooks Online	Salesforce.com	SugarCRM	Zoho CRM
QuoteWerks Edition	Professional or Corporate	Corporate	Corporate	Corporate	Professional or Corporate	Professional or Corporate	Corporate	Professional or Corporate	Corporate	Professional or Corporate	Corporate	All	Professional or Corporate	Professional or Corporate	Professional or Corporate	Professional or Corporate	Professional or Corporate	Professional or Corporate
QuoteWerks Platform (Desktop/Web)	Desktop	Both	Both	Both	Desktop	Both	Both	Both	Desktop	Desktop	Both	Desktop	Desktop	Desktop	Both	Both	Desktop	Both
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 Opportunities	✓	✓	✓	✓			✓	✓	✓		✓					✓	✓	✓
Closes Opportunities	✓	✓	✓	✓	✓		✓	✓	✓		✓					✓	✓	✓
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/Updates Activities, Calls, Meetings, or 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 25 Build 1.20
For full details on the integrations see the QuoteWerks website at: <http://www.quotewerks.com/cmfaq.asp>