

Integrating Your CRM System With Quick App

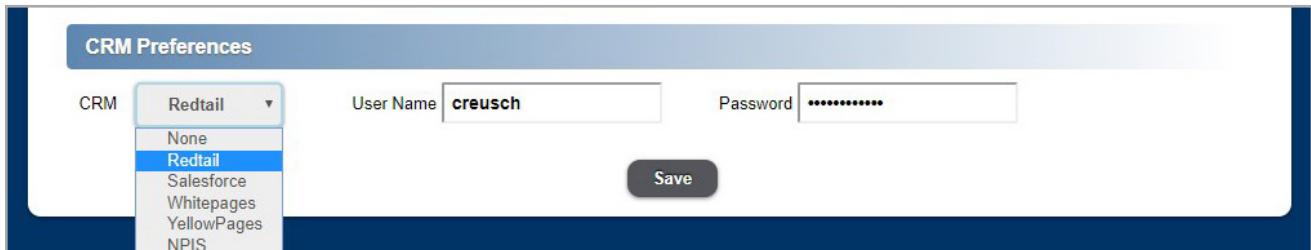
Getting started

Did you know there's an easy way to integrate your Customer Relationship Management (CRM) system with Quick App? Follow these simple steps to get started:

1. Click the **Preferences** tab on your dashboard.



2. Under **CRM Preferences**, select Redtail or Salesforce, and enter your CRM login information. Once complete, select **Save**. You will only need to do this once.



Note: If you are a **Salesforce** user, you will need to provide your Consumer Key and Consumer Secret in addition to your login information. For detailed instructions on how to find this information, visit <https://feedback.uservoice.com/knowledgebase/articles/235661-get-your-key-and-secret-from-salesforce>.



It pays to keep things simple.®

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How it works

Once you've integrated your Customer Relationship Management (CRM) system with Quick App, it's easy to import client data into your next application. Follow these simple steps:

1. Once you've selected the tax qualification and ownership type, click the **Retail or Salesforce users click here to import Owner data** button:

Non-Qualified Individual Ownership

Owner Information Retail or Salesforce users click here to import Owner data

Prefix First Name Middle Name Last Name Suffix

SSN Date of Birth Gender

2. A **My Contacts** dialog box will appear. In the upper-left corner, type the first few letters of the contact's last name or commercial name and click **Search**. Next, select a contact record to view their information. When you're ready, click the **Select** button to populate the contact information within the application.

My Contacts Name, SSN A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

2 records. << >>

Doe, Jamie
Doe, John

Jamie Doe
Birth Date: 1/1/1969
SSN: XXX-XX-6789
Street Address
City, State Zip Code
(Cellular) Phone Number

Select

3. The owner/annuitant's contact information will populate on the form.

Non-Qualified Individual Ownership

Owner Information Retail or Salesforce users click here to import Owner data

Prefix First Name Middle Name Last Name Suffix

Jamie Doe

SSN Date of Birth Gender

6789 01/01/1969



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