

Microsoft Dynamics CRM

Lead & Sales Note Transfer Addon



EASI

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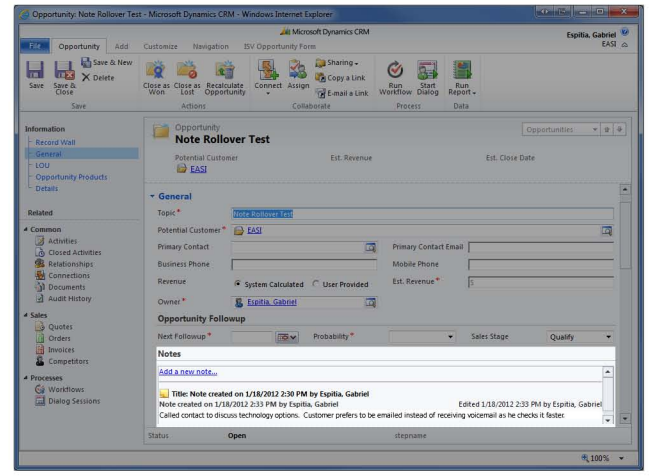
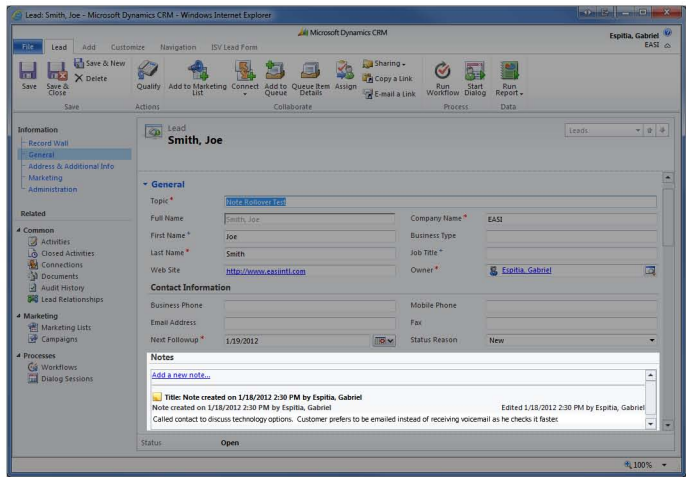
Microsoft Dynamics CRM

Lead & Sales Note Transfer Add-on

EASI's Lead & Sales Note Transfer Add-on for Microsoft Dynamics CRM allows you to retain all of your notes when qualifying a lead to either an opportunity or an account. Opportunity notes will also get transferred to any quotes created from it. Contact us at sales@easiintl.com for additional information.

Lead

Notes created in leads tend to be the most important as these are always about the client in which you wish to do business with.

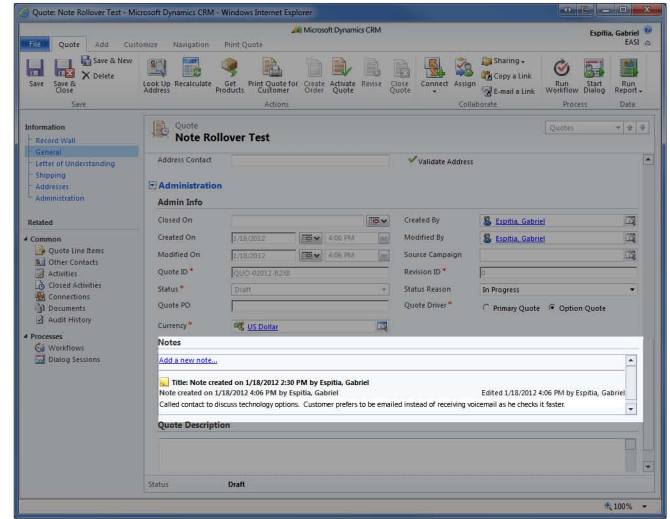
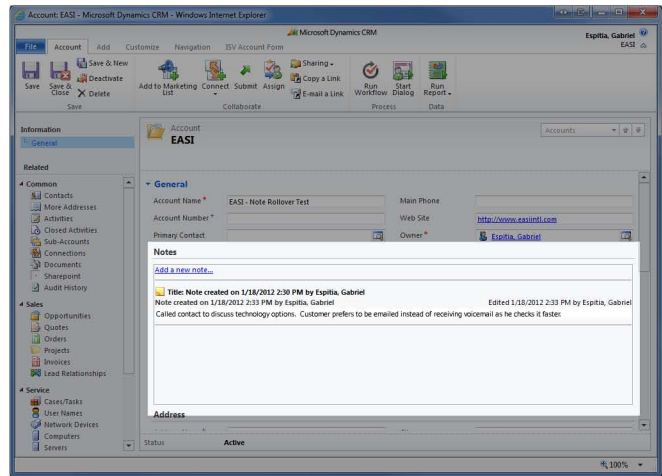


Opportunity

Once the lead is turned into an opportunity, all of your notes and important information will transfer over.

Account

Accounts created from leads will also have note information transferred over.



Quote

Quotes created from opportunities will contain all note information, giving insight on the opportunity the quote was created from.