



VERSION 2.0

INTEGRATING TIGERPAW WITH SDA

LEVERAGING SYNERGY WITH YOUR TIGERPAW AND SDA

FOUR POSSIBLE INTEGRATIONS

There are 4 possible integrations between Tigerpaw CRM+ and SalesDoc Architect. Which ones you choose to implement will be determined by your particular business processes and objectives of course, so select the one(s) that suit your needs best! This article briefly explains the processes and points you in the direction of further resources for attaining complete integrations between your sales management and document generation tools.

MERGING TIGERPAW CRM CONTACT INFORMATION INTO YOUR SDA QUOTES

Importing the contact information from your Tigerpaw system will not only save users time and eliminate errors from re-keying client data but also will help you avoid data duplication and ensure accuracy of your quotes. After locating their contact in Tigerpaw, users click the “merge to word” button which generates a word document with the contact information populating a table. Next click the “Open SalesDoc Architect” button on the MS Word Add-ins tab to push the contact info from Tigerpaw into the base info tab of a new SDA quote. The setup takes just minutes and is easy to do.

ACCESSING THE TIGERPAW PRICE BOOK WITHIN SDA

People use this integration when they want to use pricing unique to their company, or want to quote specific parts not included in the SDA database. The Tigerpaw pricebook becomes an additional resource within your SDA implementation – you gain the flexibility of using both pricing resources! Your Architect Manager first establishes a connection between your SDA implementation and the Tigerpaw database, using a utility provided by CorsPro. Users can next choose which fields to use to locate manufacturer part numbers and the cost field they want to pull from. Users can also access manufacturer part numbers in a field other than ItemID, (Tigerpaw’s primary part number field.) In that case, an “ItemID cross reference” lookup can be enabled so that if a user chooses to export their quote from SDA back to Tigerpaw, it replaces the manufacturer part numbers with the ItemIDs within Tigerpaw so that Tigerpaw can recognize those items when they’re imported on an SDA quote file.

EXPORTING A SALESDOC ARCHITECT QUOTE INTO TIGERPAW

It’s easiest to manage your client information when it’s all in one place – contact information, outstanding quotes, communications, etc. If you are managing your clients from within Tigerpaw CRM+ you can easily export your SDA quotes to Tigerpaw by applying a few extra steps. Your Architect Manager will need to place an additional output in your Outputs menu that creates a .csv version of your SDA quote. Users next import that .csv file into Tigerpaw. Depending on the specifics of your quote, you may need to apply some additional steps – for instance, if your SDA quote contains items that don’t exist in your Tigerpaw database, or if your items don’t have associated ItemIDs from Tigerpaw. We have materials to help you resolve these situations (see below).

IMPORTING A QUOTE FROM TIGERPAW INTO SDA

If you’ve already created a quote in Tigerpaw you can import it to SDA and get the additional benefits of SDA – like adding financing and leasing information, automatic labor calculations and peripheral

configuration, and producing professional proposal outputs. In SDA your Architect Manager will need to modify the Imports menu in SDA. Users would next open Tigerpaw CRM+ and export the .csv version of the existing quote. Lastly, users open up their SDA and access the Import menu from the Add-ins toolbar to import the exported Tigerpaw .csv quote.

WANT TO KNOW MORE

See these additional resources for more details on integrating Tigerpaw with SDA:

- Tigerpaw/SalesDoc Architect integration FAQs and integration tip sheets– accessible from the [CorsPro website](#)
- User manual for Architect Manager (access within the Architect Manager application, via the Help menu button, search for CRM Integration)
- CorsPro website support for Architect Managers. <http://www.corspro.com/resources/help-for-sda-managers/> (requires registration)
- Several [blog](#) articles posted on CorsPro’s website. Select the menu pull for “Integration” from the left hand side of the page.
- [Webinar](#) on Tigerpaw/SalesDoc Architect integration available on our website at
- As always, you can contact our support team at support@corspro.com if you have additional questions about your integration.