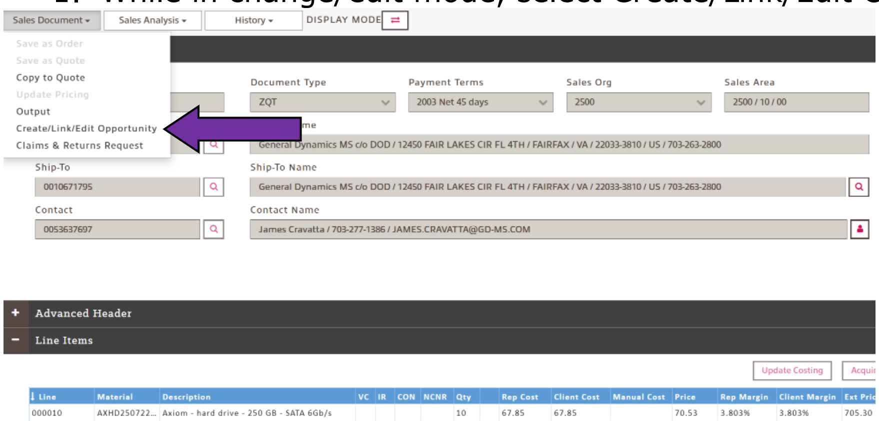
Creating ClientLink Opp from SMART

This brief is intended to provide instructions on how to create an auto populated ClientLink opportunity from your SMART quote.

Name the opportunity "NAT-QBR"

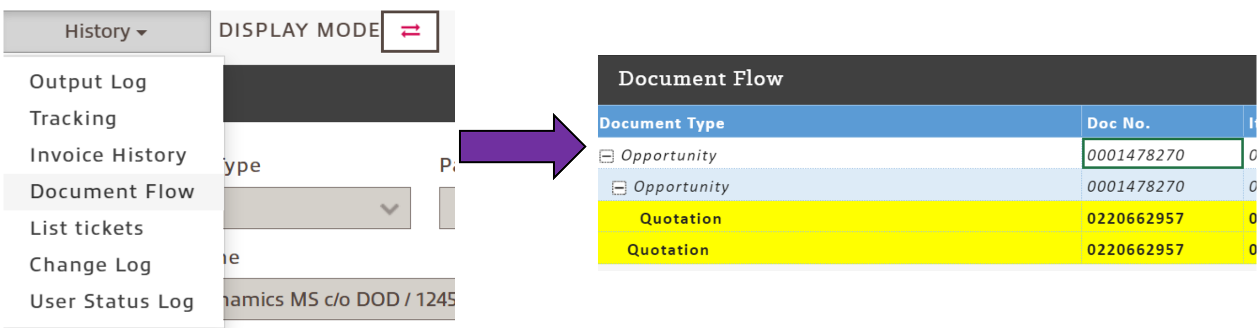
Steps to create a ClientLink Opp/ID from SMART:

1. While in change/edit mode, select Create/Link/Edit Opportunity:

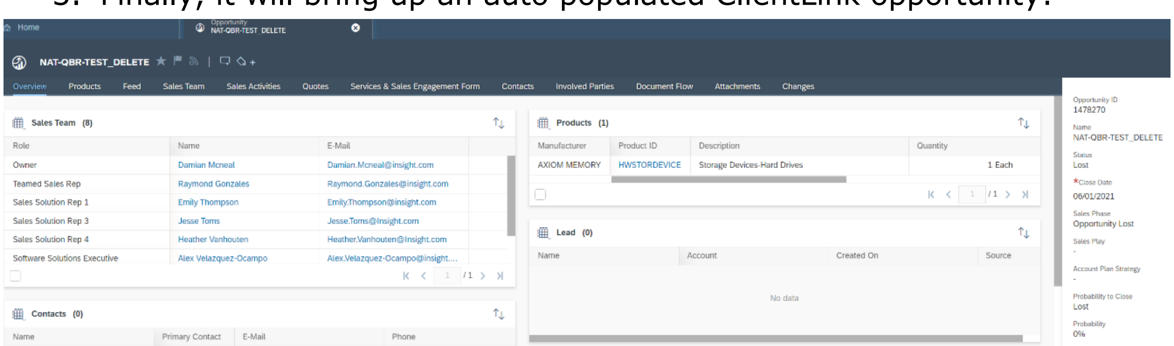


*Note might take a minute to create the ClientLink opp.

2. Next, select Document Flow under History and double click your ClientLink ID:



3. Finally, it will bring up an auto populated ClientLink opportunity:



*Note contacts, products, and other information are already populated.