

ConnectWise Manage Custom Field Mapping

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Display quotes inside of ConnectBooster

This document details out the steps needed so your customers will be able to **view Quotes**, directly from **within the customer facing portal!**

The prepared quote document will only display for **open Opportunities** inside of ConnectWise, **and** if a URL linking to the document exists. If the URL is blank or missing, the custom can still view the **open Opportunity name** as before. This feature is a convenient way for customers to view proposal documents in the billing portal, vs. typically searching an email inbox.

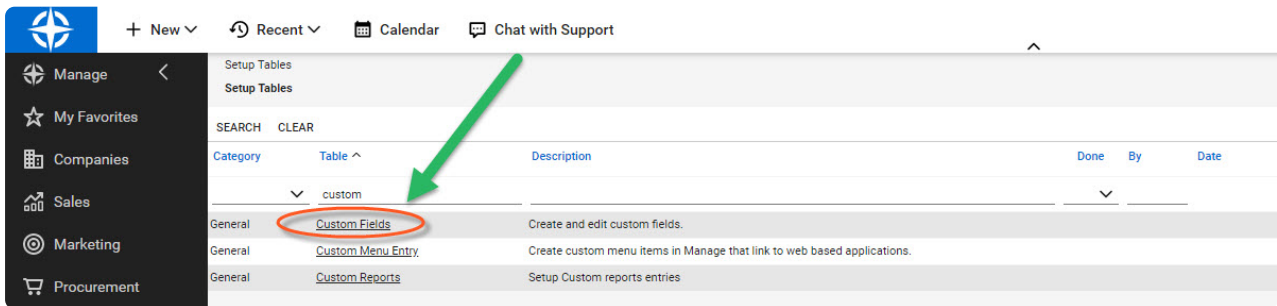
The setup is broken down into three parts, for each system in the recommended order.

Please select the correct corresponding document for the quoting vendor software for "part 2".

Part 1: ConnectWise Manage Custom Field Setup

These steps will detail out how to create a Custom Field on the Opportunity # pod. If you already have one generated, you may be able to skip this step.

Navigate to **System + Setup Tables**. Search for the **"Custom Fields"** Table.



Reduce the options by selecting the "My Opportunities" Screen.

Select the "Opportunity #".

Setup Tables > Custom Fields

Custom Fields

< SEARCH CLEAR

Screen ^	Pod Description	Custom Field Count
My Opportunities	▼	
My Opportunities	Contact Overview	0
My Opportunities	Opportunity #	1
My Opportunities	Shipping Information	0

Click the "+" to make a new Custom Field.

+ Custom Fields

Sequence #	Field Caption	Field Type	Entry Method	List View	Required
1	Customer Quote URL	Hyperlink	Entry Field		

Please note that deleting a custom field will permanently remove the field and its associated values from all records.

Label the **Field Caption** as desired, and set the **Field Type** to *Hyperlink*.

Note: you will later need to copy this Field Caption name exactly as appeared into your ConnectBooster.

+ New Recent Calendar Chat with Support

Manage My Favorites Companies Sales Marketing Procurement Project

Setup Tables > Custom Fields > Opportunity # > Custom Fields

Custom Fields

+ History

Add New Custom Field

Field Caption: * Customer Quote URL Sequence #: * 1

Help Text:

Field Type: * Hyperlink

A text field with an accompanying button for visi...

Number of Decimals: * 0

Method of Entry: * Entry Field

Required Field?
 Display on Screen?
 Read Only?
 Include on List View?
 Button URL: *

Save your changes.

In the example below, take note of where this new Custom Field displays on the Opportunity.

My Opportunities > Opportunity
Opportunity 19 - Test Opportunity with QuoteWerks

Opportunity Products 1 Notes 0 Activities 0 Attachments 4 Tracks 0 Contacts 1 Team 1 Surveys 0 Convert

< + [Icons] MORE Links History Convert OPEN SELL Win! Share [Icon]

Summary: * Test Opportunity with QuoteWerks Revenue: **\$149.99** Won: **\$0.00**
Margin: **\$0.00** Lost: **\$0.00**

Company: Blue Light, Co.

Company: * Blue Light, Co. Site: * Main
 Contact: * Colton Schumacher 12440 73rd Ct
 Company (813) 298-6100 Clearwater, FL 33612
 Customer PO#: _____

Opportunity # 19 Age: 0.8 days

Next Step: [Add new activity](#) Probability: 0
 Close Date: * Mon 11/16/2020 Source:
 Type: Rating: Hot
 Stage: * 1.Prospect Campaign:
 Status: * Open Sales Rep: * Training Admin1
 Inside Rep:
 Location: * Tampa Office
 Business Unit: * Admin

Enter Notes...
 Customer Quote URL: <https://www.quotevalet.com:443/concierge.aspx?D>

Shipping Information: Blue Light, Co.

Ship To Company: Blue Light, Co. Shipping Site: * Main
 Shipping Contact: 12440 73rd Ct
 Clearwater, FL 33612

NOTE: Population of this field will only happen automatically on newly created opportunities. If you wish to populate historic opportunities you would have to do so manually.

Part 2: Quoting Software Mapping

In order to have the URL automatically injected when a Quote is published (as shown above), you will now need to map your quoting software to use this new Custom Field.

This typically means after a quote has been published/delivered, with a customer facing URL. The goal is to get this URL assigned to your newly created "custom field", in ConnectWise Manage.

Proceed to the relevant setup document first, before continuing to Part 3.

Custom Field Mapping with QuoteValet

Custom Field Mapping with Sell

Part 3: ConnectBooster Setup

Map the Field in ConnectBooster

Navigate to **Settings + Integrations**. Select ConnectWise.

ConnectWise
5fb2d39f201f344d20fdda49

Company Name: connectbooster_c
Site: staging.connectwisedev.com
Public Key: 3MwsMlhX14isv0Vp
Private Key:

Custom Quote URL Mapping ⓘ
Custom Field Caption: CustomFieldCaptionName 1

TEST CONNECTION

LAST ATTEMPTED SYNC: 11/16/20 @ 1:36PM
LAST SUCCESSFUL SYNC: 11/16/20 @ 1:37PM

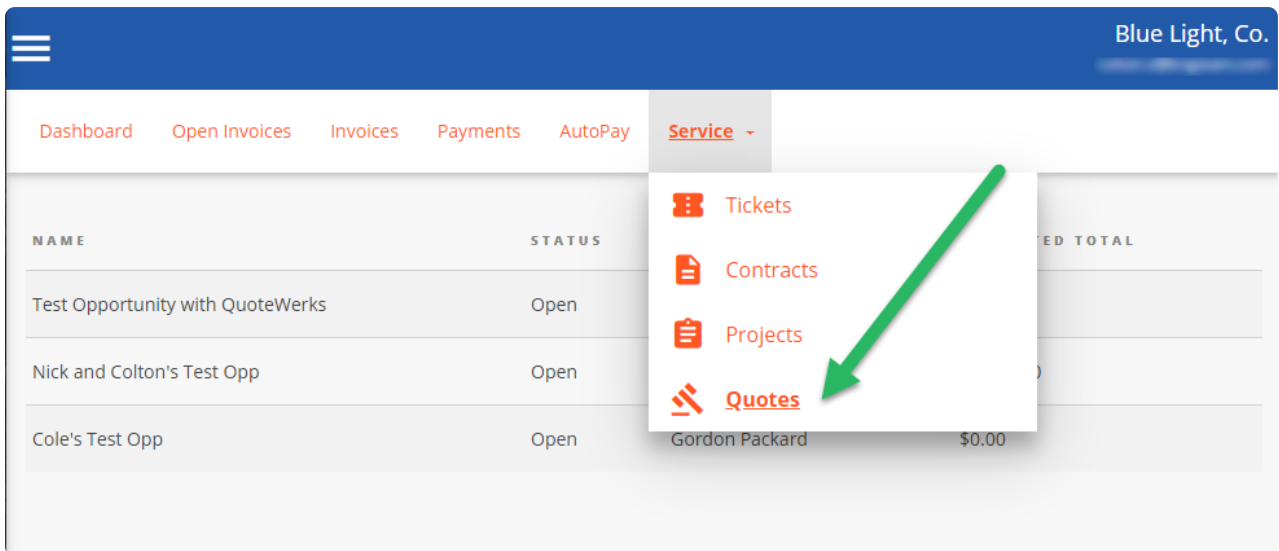
DISABLE SYNC 2 SAVE CLOSE

1. Enter the name of the Custom Field generated in Part 1

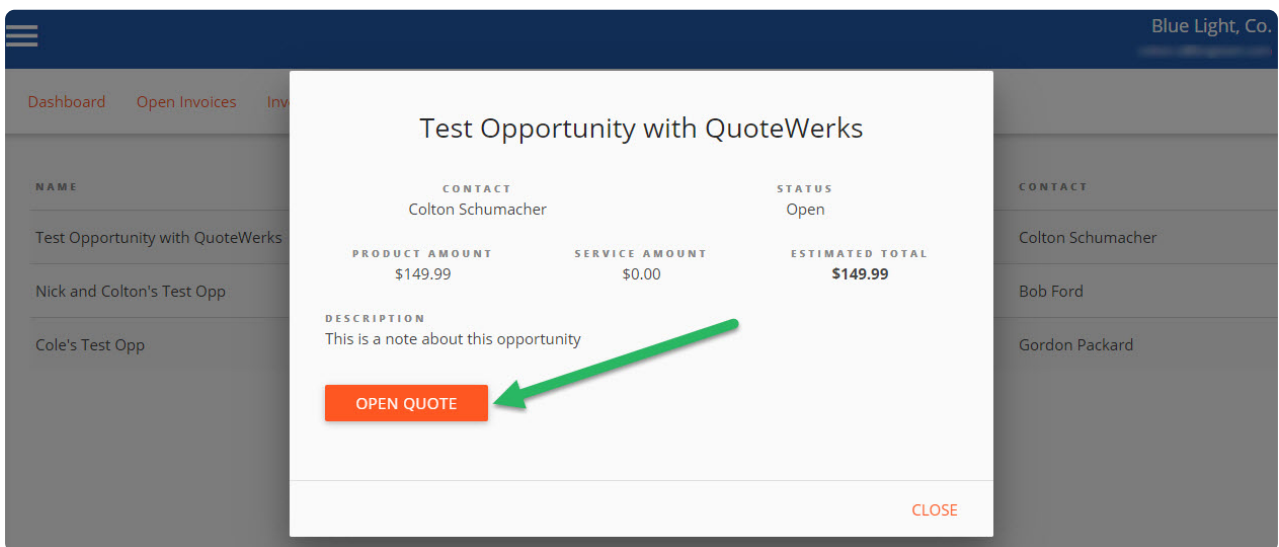
2. Save Changes

Conclusion:

On the Client Portal, under Service + Quotes, select an open Opportunity.



The "Open Quote" button now displays.



That's it! When the client selects the "Open Quote" option, a new browser tab will open to display the Quote acceptance page.

Note: if your client's report missing the "Service" section, you may need to enable the permission to view "Quotes". This can be found under **Settings + Configurations + Client Profiles**