

Autotask User Defined Field Mapping for Opportunities

Last Modified on 02/02/2024 11:52 am CST

Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

<https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm>

Display quotes inside of ConnectBooster

This document details out the steps need so organizations 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 Autotask, **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 organizations to view proposal documents in the billing portal, vs. typically searching an email inbox.

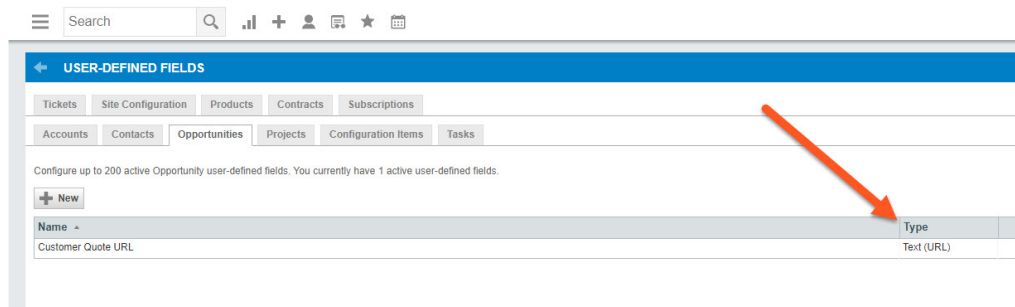
The setup is broken down into 3 parts, for each system and in the recommended order. This document is tailored to using Autotask PSA, and QuoteWerks/QuoteValet.

However, ConnectBooster's functionality will work with the UDF regardless how the URL was inserted into the Autotask Opportunity.

Part 1: Autotask User Defined Field Setup

These steps will detail out how to create a "User Defined Field" on the Opportunity template. If you already have one generated, you may be able to skip this step. There are multiple ways to get to the creation step, but it should look like the example below.

Example UDF: (under the "APPLICATION-WIDE (SHARED) FEATURES" section, and **User-Defined Fields**)



To begin, use the 3 bar menu & navigate to **ADMIN**.

Select the "SALES & OPPORTUNITIES" section. From here, select the Opportunity Category you wish to modify.

← OPPORTUNITY CATEGORIES

Opportunity categories serve as a classification for opportunities. Each opportunity category can dictate the layout of the New/Edit Opportunity and Opportunity Detail pages. Fields are required, and which options are available in pick list fields, and what default values of fields will be when a new opportunity is created with this category.

+ New

		Opportunity Category	Default	System	Active
1		Standard	✓	✓	✓
2		Standard (non-editable)		✓	

Edit the Category, and select the **Details** tab. From here, we can select "New User-Defined Field".

EDIT OPPORTUNITY CATEGORY - Standard

Save & Close Save Cancel

General Details Insights

SECTIONS & FIELDS

Drag and drop the sections to control their order of appearance in the Details panel. Drag and drop fields between sections and within sections to control where they display. Specify default values and available list values. You may also specify which fields are required. "N/A" in the "Default Value/Selection" column means that a default value cannot be set for that field.

+ New Section + New User-Defined Field

		Section Label/Field Name*	Default Value/Selection	Available List Values	Required
6.3		Market		N/A	
6.4		Barriers		N/A	
6.5		Help Needed		N/A	
6.6		Next Step		N/A	

In this example, we will call it "Customer Quote URL", but you may label this as needed.

Note: the "Field Type" is set to Text (URL)

USER-DEFINED FIELDS ?

Save & Close
 Save & New
 Cancel

Name *

 Active

Description

Sort Order

Field Type

Text (URL) ▾

The last step is to make this new UDF **Visible** as below:

7		Win/Loss Metrics		
7.1		Win Reason		All
7.2		Win Reason Details		N/A
7.3		Loss Reason		All
7.4		Loss Reason Details		N/A
8		User-Defined Fields		
9				
9.1		Customer Quote URL [UDF]	external ent	N/A
9.2				N/A

Part 2: QuoteWerks & QuoteValet Setup

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 UDF.

DataLink Setup

Inside of QuoteWerks, navigate to **Contacts + Setup Contact Manager**.

Select the Autotask option, and DataLink Setup.

Contact Manager Setup

Select Contact Manager:

- (None)
- Act!
- Act For Web
- Autotask**
- Connectwise
- GoldMine
- Google Contacts
- Kaseya BMS
- Maximizer
- Maximizer CRM
- MS CRM
- Outlook
- Peachtree
- QuickBooks
- QuoteWerks
- salesforce.com
- SalesLogix
- SugarCRM
- Zoho CRM

Autotask (Pro and Go!) settings

Autotask Connection

Cloud

On-Premise Server URL:

Autotask API Login Credentials

Username:

Password:

Autotask User Credentials for 'Administrator'

Contact Manager User Credentials are specified per user on the 'Contact Manager' tab under the Tools->My Preferences menu, but you can change them here for the currently logged in user.

Change user credentials here:

Username:

How to use QuoteWerks with the contact manager:

Click on the SOLD TO / SHIP TO tab of the Quote WorkBook and click on the [search] button located near the sold to box. This will enable you to search your Autotask account and contact list to use in the quote. Additionally, when you save a quote, you will be presented with the option to create a quote attachment record, Sales Opportunity, Schedule Calls, and more in Autotask.

Add a new mapping as shown in the image below:

1. CRMOppHeader_CreateUpdate
2. Pick the &DH_&QuoteValeCustomerFacingURL data point to "Write out to External System" (Autotask)
3. Map the URL data to the Custom Field you created earlier.

DataLink Mapping

Step 1)

Event/Action/Context: **1**

Step 2)

External System ID:

Step 3) Assign Field Mapping

Read into QuoteWerks

External System Field as Source:

QuoteWerks Field as Destination:

Write out to External system

QuoteWerks Field as Source: **2**

External System Field as Destination: **3**

Note: "Customer Quote URL" was used as the UDF in this example, but feel free to label this as needed.

Part 3: ConnectBooster Setup

Map the Field in ConnectBooster

Navigate to **Settings + Integrations**.

Select Autotask

Autotask
579faa7ffd8f343748ada6ec

Username
eqvorv5rogs4pkx@connectboosterdemo.com

Password
.....

Custom Quote URL Mapping[?]
Enter User-Defined Field Name
ExactNameOfUDF **1**

Make sure integration information is saved, before using the test connection button.

Test Connection

LAST ATTEMPTED SYNC LAST SUCCESSFUL SYNC

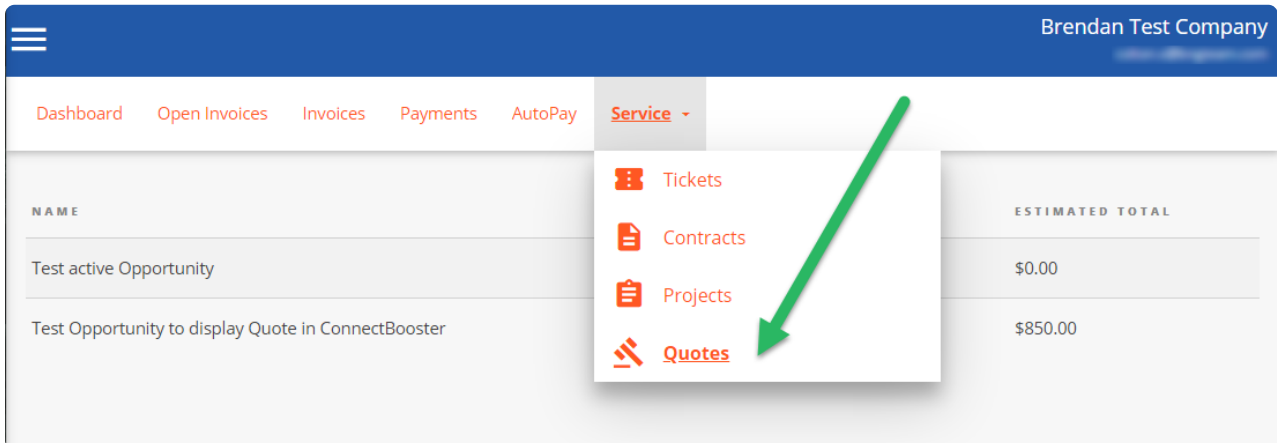
Close **Save** **2** **Disable Sync**

1. Enter the name of the UDF generated in Part 1

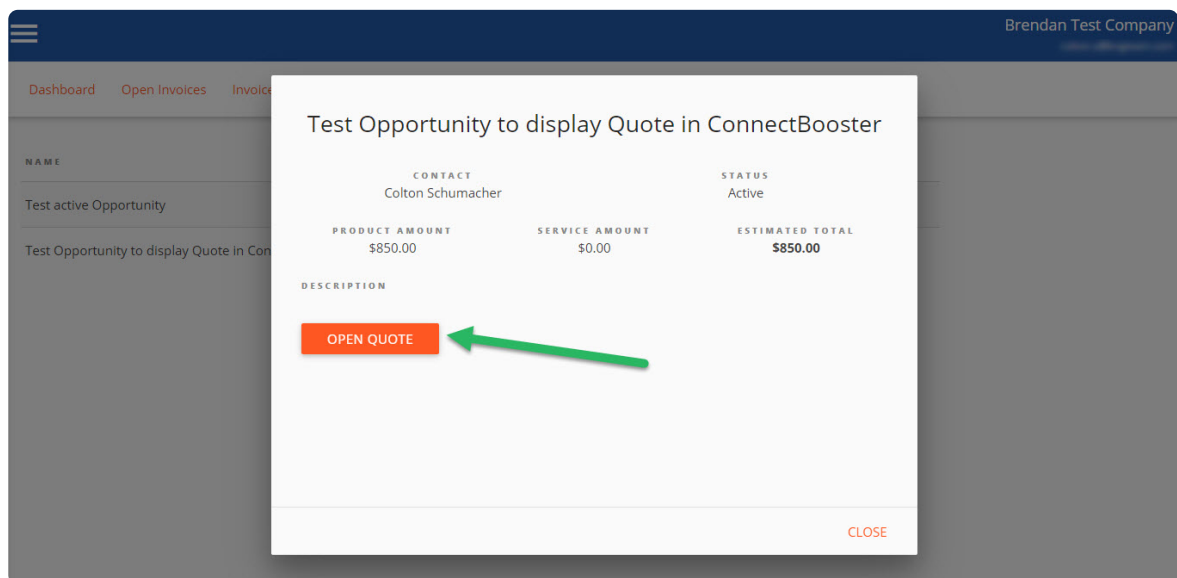
2. Save Changes

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" button, 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**