

Custom Field Mapping with Sell

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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>

ConnectWise Sell & Order Porter Field Mapping

This document is the tailored ConnectWise Sell specific setup article.

Note: the options below will NOT be available with the **Sell Basic** tier

For Part 1 & 3, Please visit:

ConnectWise Manage Custom Field Mapping

<https://docs.connectbooster.com/help/connectwise-manage-custom-field-mapping-opportunities>

Part 2: Sell & Order Porter Setup

In order to have the URL automatically injected when a Quote is published, you will now need to map Order Porter to use this new Custom Field.

Login to Sell via Administrative user.

Navigate to **Settings > CRM Integration > Opportunity Settings > Custom Opportunity Mappings**.

If step 1 has been completed correctly, you should already see a field named '**Customer Quote URL**'.

In line with the Customer Quote URL field, select **OrderPorterURL** in the dropdown menu and select Save.

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Custom Opportunity Mappings Setup

(FROM) Quote Property	Force To Value	(TO) Manage Property
QuoteReadableId ▼		Quote Number
▼		Date Quoted
OrderPorterUri ▼		Customer Quote URL
▼		Home Address for Delivery

That's it! Proceed to Step 3 to finish setup within the ConnectBooster portal.

Note:

- The link will not generate until after the quote has been published and sent to the organization.
- Information is only pushed to Manage when the user updates the opportunity, so if the link does not populate the Manage field you may to resave the Opportunity.
- The field will not be visible in a quotes UI, it will only be accessible from the mapping screens.