

Custom Field Mapping with Sell

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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

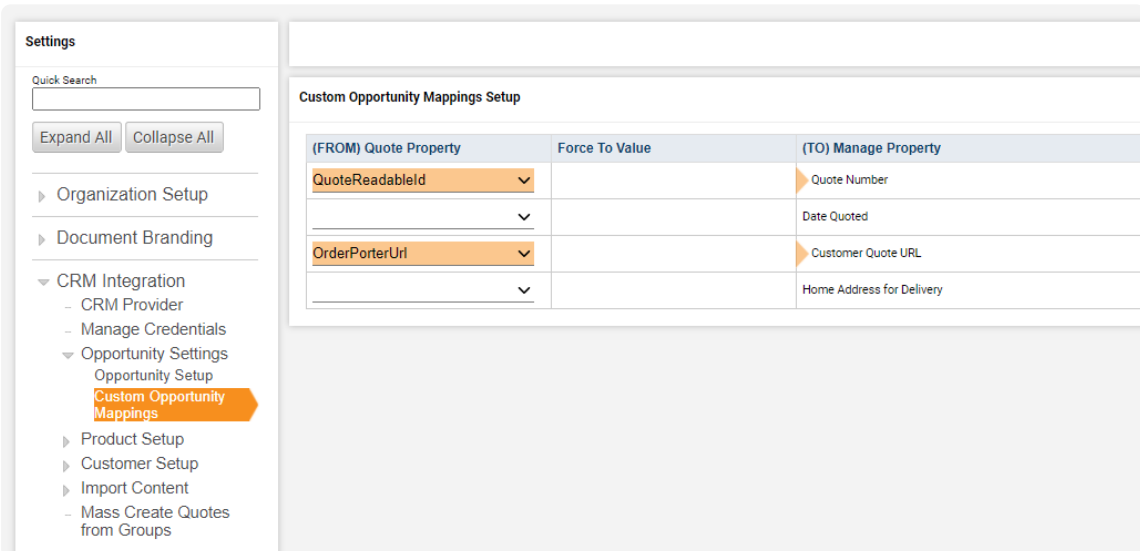
In order to have the URL automatically injected when a Quote is published, you will now need to map Order Porter to use this new Custom Field.

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.



The screenshot shows the 'Settings' sidebar on the left with 'Custom Opportunity Mappings' selected. The main content area displays the 'Custom Opportunity Mappings Setup' table.

(FROM) Quote Property	Force To Value	(TO) Manage Property
QuoteReadableId		Quote Number
		Date Quoted
OrderPorterUrl		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 customer.
- 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.