Custom Field Mapping with Sell

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.

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.