Custom Field Mapping with QuoteValet

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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

QuoteWerks & QuoteValet Field Mapping

This document is tailored to using ConnectWise Manage, and QuoteWerks/QuoteValet.

For Part 1 & 3, Please first visit:

ConnectWise Manage Custom Field Mapping

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

Part 2:

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

DataLink Setup

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

Select the ConnectWise option, and DataLink Setup.

Add a new mapping as shown in the image below:

> 1. CRMOppHeader_CreateUpdate
>
> 2. Pick the &DH_&QuoteValetCustomerFacingURL data point to "Write out to External System" (ConnectWise)
>
> 3. Map the URL data to the Custom Field you created earlier.
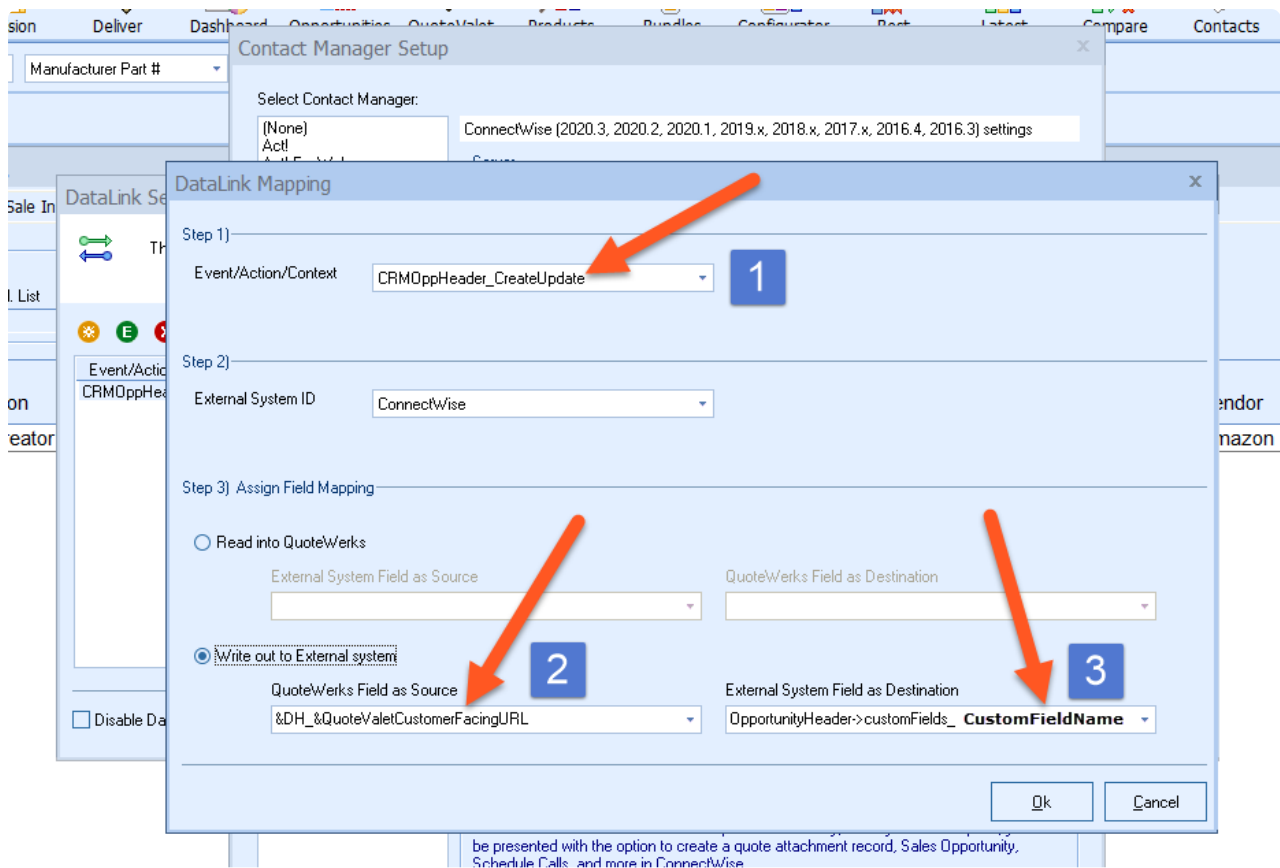
That's it on the QuoteWerks side!

Please proceed to **Step 3** in the original article to finish setup within the ConnectBooster portal.

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