

# 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.

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

ConnectWise (2020.3, 2020.2, 2020.1, 2019.x, 2018.x, 2017.x, 2016.4, 2016.3) settings

Server

ConnectWise Server URL:

Company ID/Name:

ConnectWise REST API Credentials:

Public Key:

Private Key:

ConnectWise 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:

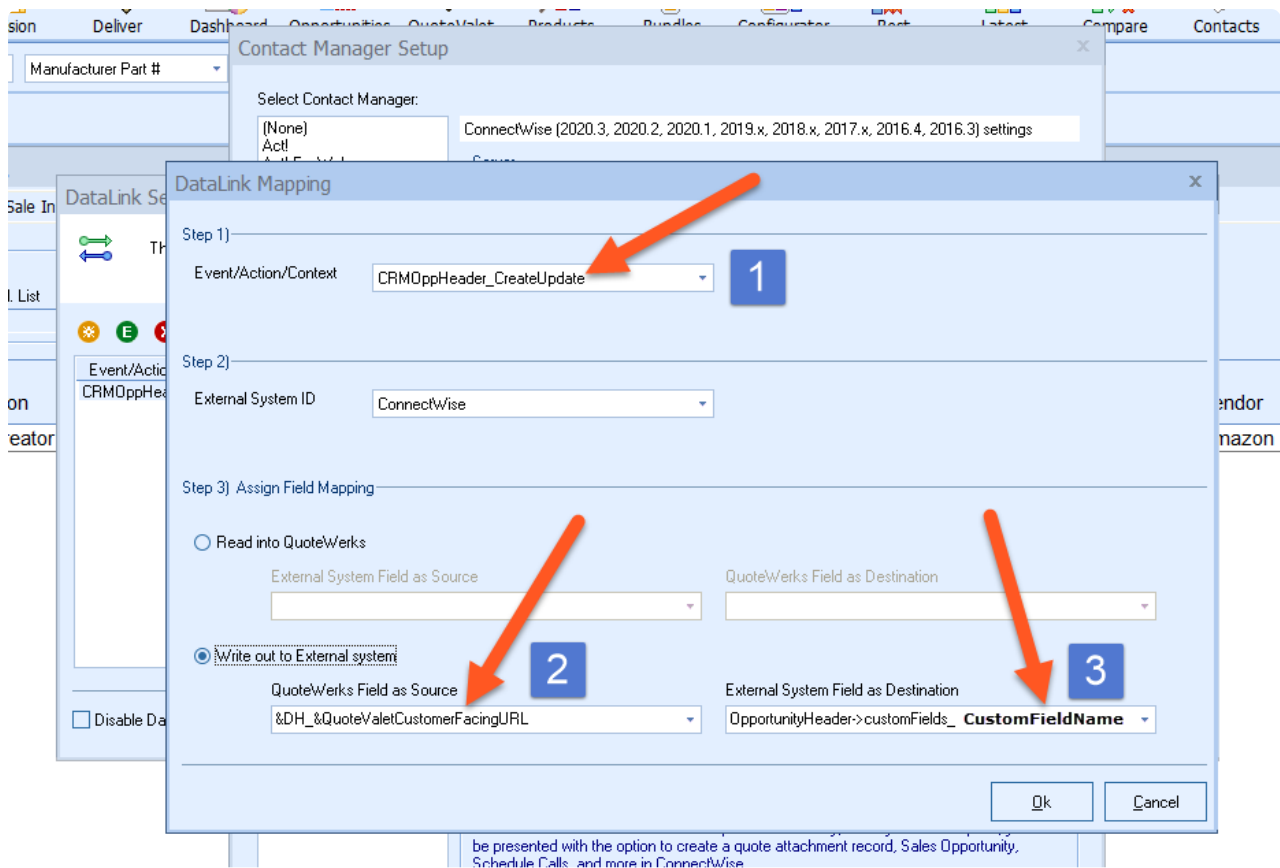
Username:

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 ConnectWise 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 ConnectWise.

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.