QuoteWerks DB Setup

For companies that have purchased the QuoteWerks sales software, selecting this option will open the QuoteWerks application login form.   Once the User logs in from this form, the QuoteWerks Integration form will be displayed.

The QuoteWerks Integration form is used to perform functions which provide integration between the SedonaOffice application and the QuoteWerks application. This form is divided into three forms, each of which is described below.

Connection Setup

The Connection Setup form contains information needed for the SedonaOffice application to connect with the QuoteWerks database. A SedonaOffice Support Specialist will assist your company with the initial setup of this information.

Mapping Fields

SedonaOffice customers subscribing to the QuoteWerks Integration functionality have the option to map certain fields from QuoteWerks to SedonaOffice. When a new Job is created in SedonaOffice, the mapped field from QuoteWerks will be populated into the mapped field of the SedonaOffice Job custom fields.

Notes Mapping

Quotes created in the QuoteWerks application have four note fields available. This form allows your company to map the Note Type from QuoteWerks into a SedonaOffice Job note. When a new Job is created in SedonaOffice from a QuoteWerks Order, any information entered into the QuoteWerks notes fields will create a note in the SedonaOffice Job Notes.