

Sedona QuoteWerks Integration Changes

Last Modified on 10/16/2025 9:56 am EDT

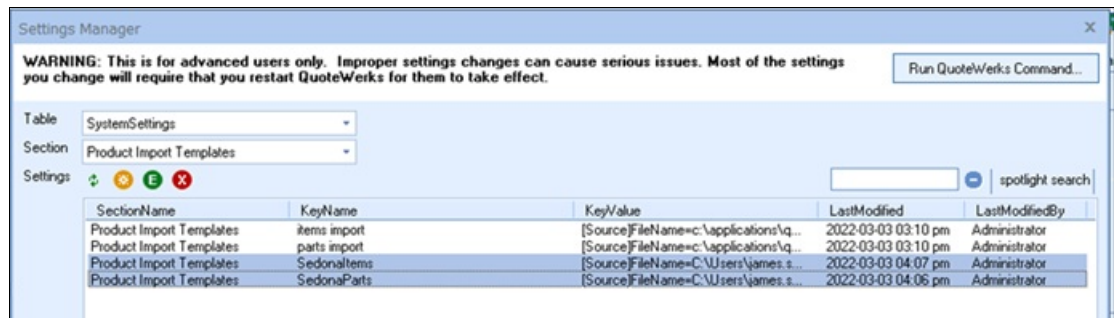
To use the latest QuoteWerks integration in SedonaOffice you need to ensure you have the following items:

1. The following files need to reside in the QuoteWerks Install directory (These are used by SedonaOffice to start the export process):
 - Sedonaitems.pit
 - Sedonaparts.pit
 - Sedonarecurringitems.pit

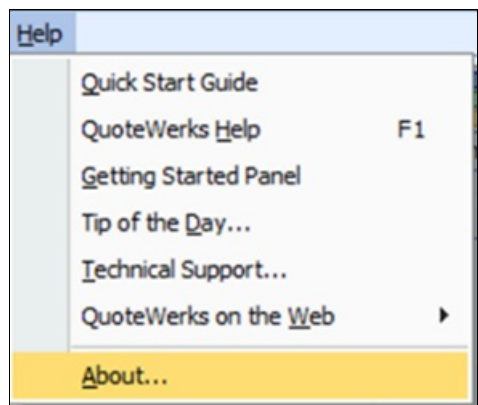
Note: If the above files are not in the QuoteWerks Install directory the export will not work. If you do not have these files, you can create text files and change the extension to .pit and place them in the directory. Files with these names must exist in the QuoteWerks Install directory for SedonaOffice to start the export. The files do not have to have anything in them.

These are used by SedonaOffice QuoteWerks integration export button to export the items, parts, recurring items to QuoteWerks:

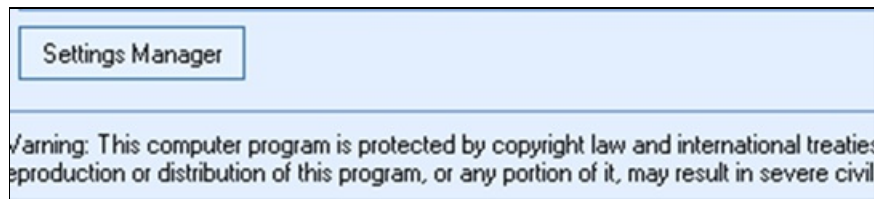
- SedonaItems.txt
 - SedonaParts.txt
 - SedonaRecurringitems.txt
2. Templates for Sedonaitems, SedonaParts and Sedonarecurringitems need to exist in QuoteWerks Settings Manager > SystemSettings > Product Import Templates:



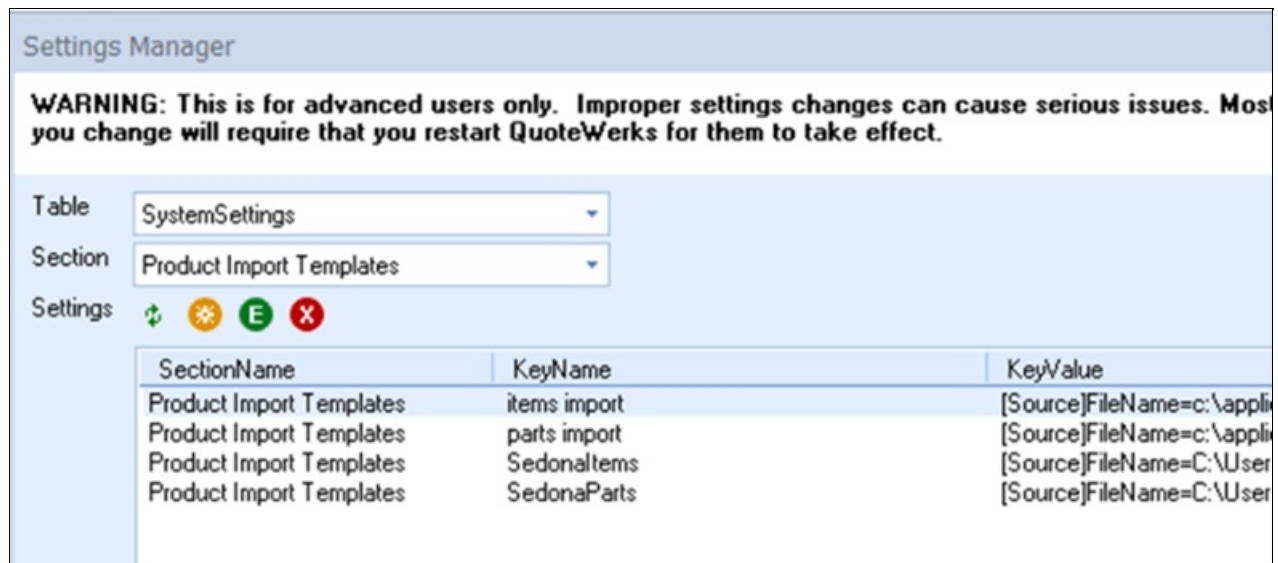
You can access the above area from QuoteWerks > Help > About:



Click on Settings Manager in the lower left corner of the screen:

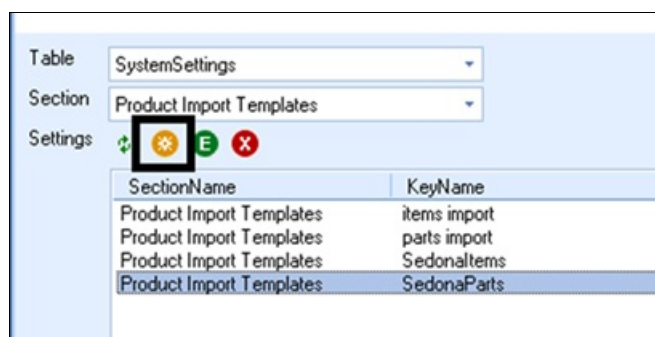


Select System Settings in the Table drop down and Product Import Templates in the Section drop down:



If the templates for SedonaItems, SedonaParts and SedonaRecurringItems do not exist you need to add these templates.

Create a new template by clicking on the settings gear:



Create new templates for SedonaItems, SedonaParts, and SedonaRecurringItems

For each of these Product Import Templates you must add a Source path to the .txt file name (SedonaItems.txt, SedonaParts.txt, and SedonaRecurringItems.txt) in your QuoteWerks install directory. See Example below:

Edit Setting

Table: SystemSettings

Section: Product Import Templates

KeyName: SedonaParts

KeyValue:

```
[Source]
FileName=C:\Users\james.schneider
\Desktop\QuoteWerks
\SedonaParts.txt
NumberOfFields=28
MaxFieldUsed=28
Delimiter=TAB
LineDelimiter=CRLF
```

Ok Cancel