

How to Import Items and Parts into QuoteWerks

01/23/2026 4:26 pm EST

Description of Issue:

How do I get items and parts from SedonaOffice into QuoteWerks.

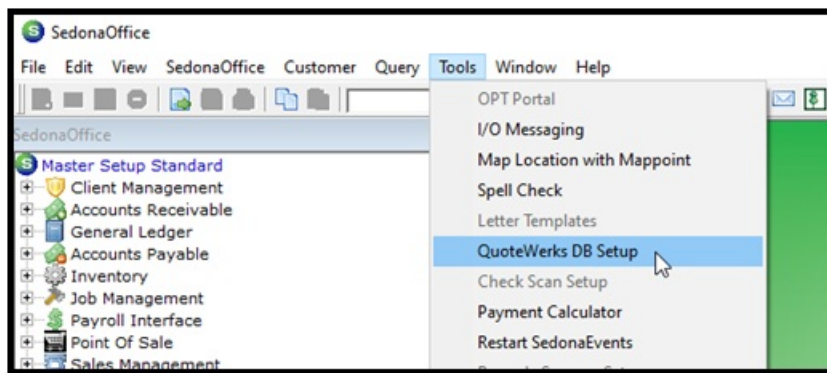
Resolution:

These instructions assume that QuoteWerks is installed, and the integration has been configured.

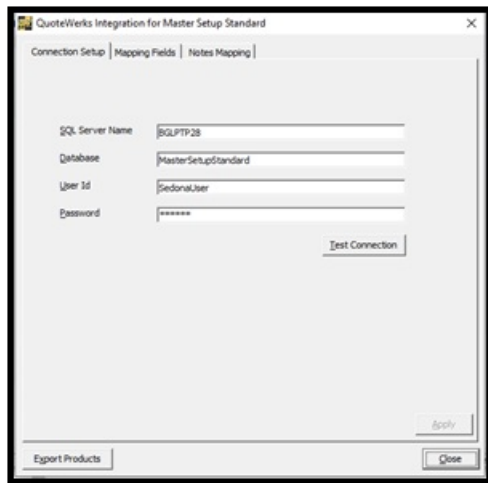
Open SedonaOffice

Click the Tools dropdown in the toolbar.

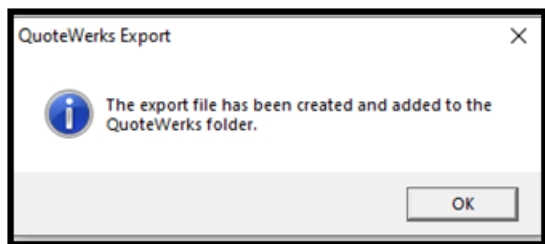
Select QuoteWerks DB Setup



Click the Export Products button.



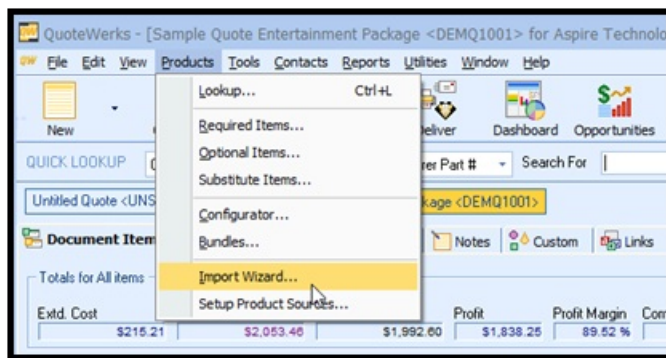
When the export process has finished you will see a message that the file has been created.



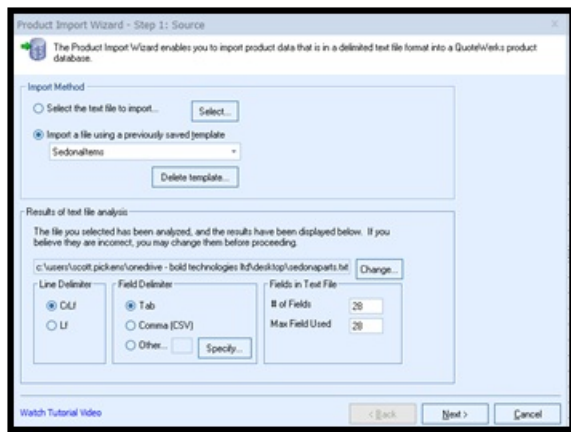
Open QuoteWerks.

Select the Products dropdown from the toolbar.

Select Import Wizard.



You can select to use an existing template or select a test file to import if you have not already save a template.

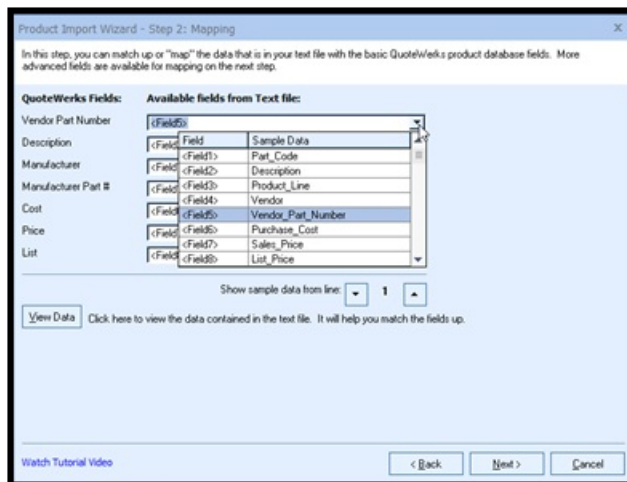


Click Next.

Step 2 is to select the proper fields from the file to relate to the fields needed by QuoteWerks.

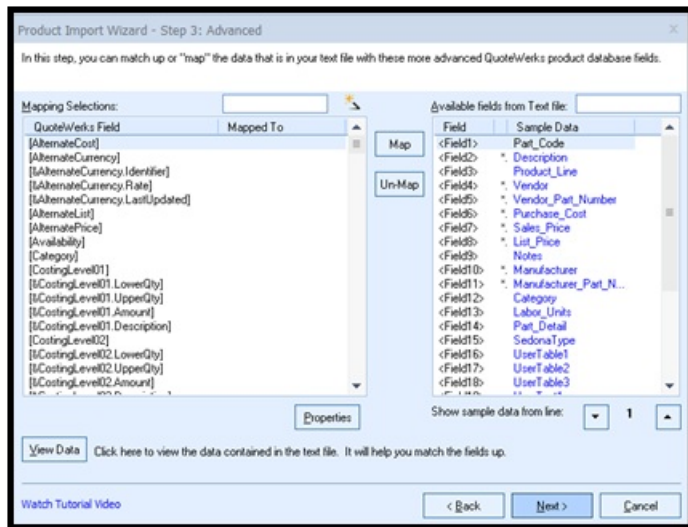
If you are using a template, you should just verify the fields are correct before continuing to the next step.

You can also use the preview to see what the data looks like before moving on.



Click Next.

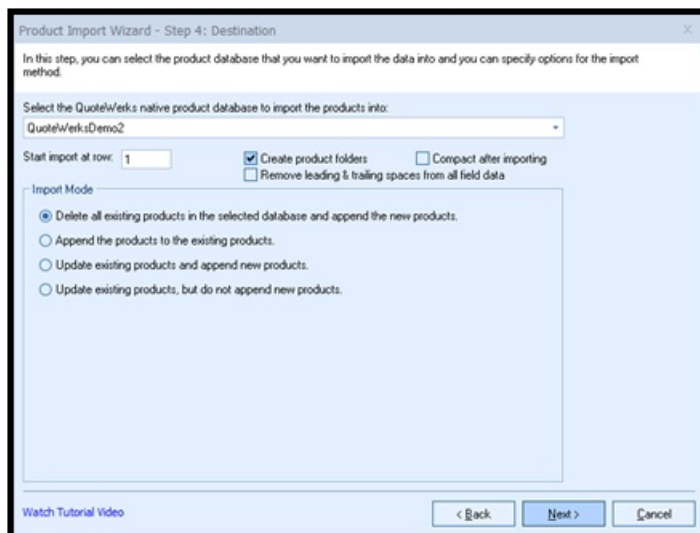
In Step 3 you can map any additional fields from the import file to the QuoteWerks table.



Click Next.

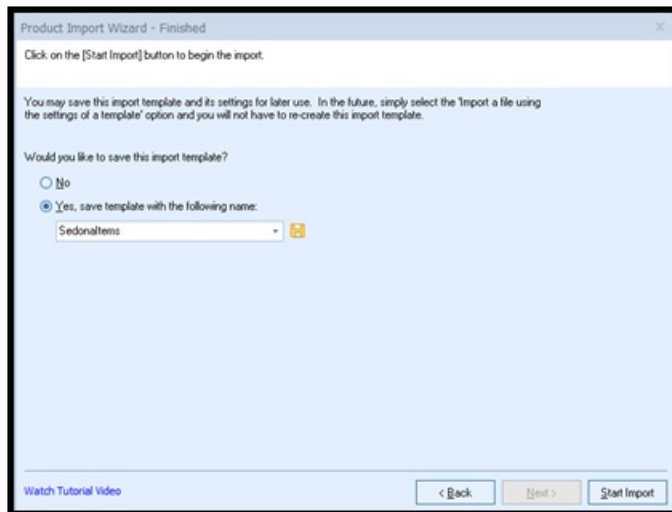
Select the company and options you want to use for the import.

These options are based on your companies' defined procedures for the import.



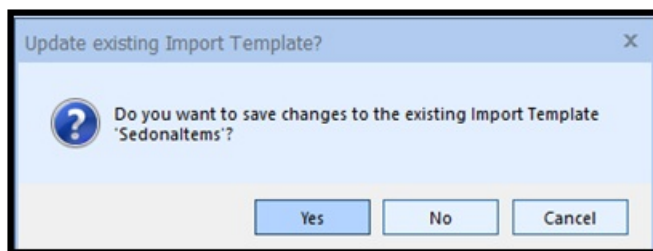
Click Next.

The final step allows you to save the template to make the import quicker the next time it is done.

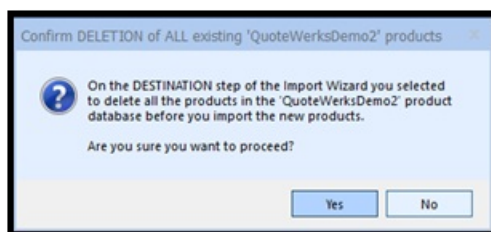


If ready to run the import process click Start Import.

When you click Start Import it will ask again if you want to save the template.

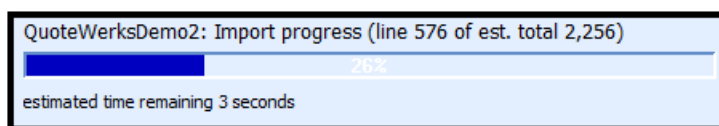


If you select to delete products before importing it will ask if this is what you want to do.

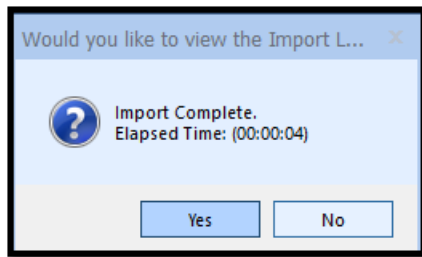


If ready, Click Yes.

You should see a processing screen open showing the import status.



When complete you have the option to view the Import Log file.



Clicking Yes will open the log file generated from the import process with details and any errors found.

