QuoteWerks Expands CPQ Integration and Automation Strategy with Zapier

New Zapier integration extends QuoteWerks' 115+ native integrations while expanding automation, custom workflows, data access, and future AI possibilities



QuoteWerks Logo

ORLANDO, FL, UNITED STATES, September 24, 2026 /EINPresswire.com/ -- QuoteWerks, a leading CPQ and quoting software solution for small and midsize businesses, today announced the expansion of its integration and automation capabilities through its new Zapier integration. The integration enables QuoteWerks Web customers to connect their quoting workflows with thousands of applications across CRM, PSA, accounting, marketing, project management, productivity, AI, and other business systems.

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> *Brian Laufer, QuoteWerks Vice President*

Zapier builds on QuoteWerks' existing ecosystem of more than 115 native integrations and is part of a broader strategy to make QuoteWerks Web increasingly open, extensible, and adaptable to the technology stacks customers already use.

QuoteWerks has long focused on connecting the quoting process with the systems surrounding it. Native integrations continue to provide deep, purpose-built connections to many CRM, PSA, distributor, accounting, payment, tax, shipping, and other platforms. Zapier adds another layer by making it easier to connect QuoteWerks Web with applications where a native integration may not exist and to create workflows spanning multiple systems.

"Zapier is not a replacement for the integrations we already build. It is another layer in a much broader integration strategy for QuoteWerks Web," said Brian Laufer, Vice President of QuoteWerks. "Between our native integrations, Zapier, REST API, OData, webhooks, and AI-assisted scripting, customers have more ways to connect QuoteWerks to the systems and processes that matter to their business."

From Pre-Built Integrations to Customer-Defined Workflows

The QuoteWerks Zapier integration can both send information from QuoteWerks to other applications and bring information from connected systems into the quoting process.

Customers can use Zapier to automate workflows involving contacts, products, opportunities, quotes, line items, document activity, and other business processes. For example, a sales team could search an external system for customer or product information, create or update CRM opportunities, send quote information to another business platform, or initiate downstream processes when quoting activity occurs.

For organizations using CPQ software to manage more complex sales processes, this creates additional flexibility around how product, pricing, customer, and workflow data moves between systems without requiring every connection to be built as a native integration.

QuoteWerks has also begun publishing pre-built Zapier templates to make common workflows easier to deploy. Its first published template connects QuoteWerks with Syncro, allowing QuoteWerks users to search Syncro for matching organizations directly from a QuoteWerks contact search.

“Every sales organization has a slightly different technology stack, and customers increasingly expect those systems to work together,” said Rob Morton, Director of Sales at QuoteWerks. “Zapier gives customers another way to fit QuoteWerks into the tools and processes they already use instead of redesigning their workflow around their quoting software. As we publish more templates, we can also make these workflows easier to adopt without customers having to start from scratch.”

Customer Workflows Can Help Shape Future Integrations

Zapier also gives QuoteWerks another way to understand how customers are extending their quoting environment.

When customers repeatedly connect QuoteWerks with a particular CRM, PSA, ERP, industry application, AI platform, or other system, that usage can provide insight into where demand exists for additional templates, expanded Zapier functionality, or deeper native integrations.

“We have always received requests to integrate QuoteWerks with different applications, but there are thousands of business platforms and countless combinations of workflows,” Laufer said. “Zapier lets customers solve more of those requirements today while also giving us another signal about the integrations and workflows they actually value.”

Part of a Larger QuoteWerks Web Integration Strategy

Zapier is one component of a broader QuoteWerks Web extensibility strategy that gives customers, partners, and developers multiple ways to connect, automate, customize, and work with QuoteWerks data.

115+ native integrations provide purpose-built connections with applications used throughout the quoting and sales process.
- Zapier enables no-code and low-code workflows across thousands of additional applications and services.
- AI-assisted scripting helps customers create custom business logic and automate workflows inside QuoteWerks Web.
- Webhooks enable event-driven automation between QuoteWerks and external systems.
- REST API provides developers with programmatic access for custom integrations, applications, and automation.
- OData v4 provides structured access to QuoteWerks data for reporting and analytics tools such as Microsoft Power BI, Microsoft Excel, and Tableau.

Together, these capabilities let organizations choose the integration approach that best matches the depth, automation, customization, and data access their workflow requires.

Building the Foundation for AI-Driven Quoting Workflows
The same architecture also creates new opportunities for AI to participate in sales and quoting workflows.

AI-enabled applications can already take part in workflows involving QuoteWerks through Zapier. Potential uses include extracting structured requirements from emails or documents, classifying incoming quote requests, analyzing quote activity, generating personalized follow-up, summarizing sales activity, and coordinating actions between QuoteWerks and other business systems.

Through Zapier MCP, compatible AI environments can also interact with supported QuoteWerks actions, creating additional possibilities as AI agents become more involved in business processes.

“We are still early in understanding how AI will change sales workflows, which is exactly why building an open integration foundation matters,” Laufer said. “The goal is not to predict every AI application our customers will use. It is to make sure QuoteWerks can participate in those workflows as they evolve.”

The QuoteWerks Zapier integration is included with all editions of QuoteWerks Web and is available through the Zapier App Directory.

For more information about QuoteWerks and Zapier, visit https://quotewerks.com/extend-quotewerks/zapier/.

To explore additional ways to extend QuoteWerks Web through AI-assisted scripting, REST API, OData, webhooks, and automation, visit https://quotewerks.com/extend-quotewerks/.

Developers can explore the QuoteWerks Web REST API and OData documentation at https://qwwapi.quotewerks.com/.

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