

User Manual Version 3.1 for ActiveCampaign



www.goldrushtechnology.com.au

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Overview

TanamiGold is and integration tool to integrate QuoteWerks with either ActiveCampaign or Active Campaign. This version of the manual is if you use ActiveCampaign with QuoteWerks.

There are four basic times that TanamiGold passes data between your CRM.

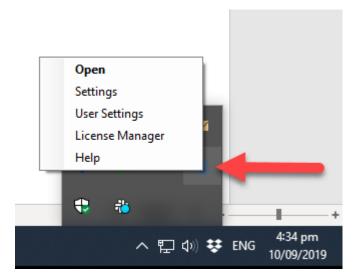
- Contact Search
- Document Save
- Preview Quote (ActiveCampaign Only)
- Emailing a Quote. (ActiveCampaign Only)

TanamiGold runs as a separate program that is started when QuoteWerks starts, initiated from entries in the SITEBOOT.INI file.

TanamiGold is managed via an icon in the Windows System Tray.



Right Click the icon to see the menu.



Installation

TanamiGold installs in the QuoteWerks Application Folder. So, like QuoteWerks, you run the installer and point it to QuoteWerks Application Folder, from one workstation. Then you run NoteSetup.exe from each workstation. The NodeSetup.exe is only required when you first install. It's not required for updates. In fact, all it does is give permission for the program to write to the local computers event log, so it's not 100% necessary.





You install TanamiGold within your QuoteWerks Application folder. The installer will find the folder location for the last QuoteWerks install. If you need to change this, use the change button. You would only need to do this if you have more that one installation of QuoteWerks on your computer.

🕞 TanamiGold Setup	- 🗆 X	
QuoteWerks Application Folder Select your QuoteWerks Installation	STanamigoli	k
Select your QuoteWerks Application Folder. :	:	
C:\Applications\QuoteWerks\ Change.		
	Back Next Cancel	

If you need to, change to your QuoteWerks Application folder. If you aren't sure what this folder is, in QuoteWerks, go to Help, About, Then Select the System Tab.

oout QuoteWerks v5.4 (I	uild 7.12)	×
About System		
	System Information	
Version Build	v5.4 (Build 7.12)	▲
Product Edition	v5.4 Corporate Edition	
Primary License Type	Master	
Install Path		

Navigate to your current QuoteWerks Installation, usually on your Network Server (but not always)

🔀 TanamiGold Setup	×
Change destination folder	Atomanicald
Browse to the destination folder	STanamiGold
Look in: Applications	~ E e
QuoteWerks	
Folder name: L:\Applications\QuoteWerks\	
	OK Cancel
Then Click Next	
援 TanamiGold Setup	– 🗆 X
OpteWerks Application Folder Select your QuoteWerks Installation	STanamiGold
Select your QuoteWerks Application Folder.	
L:\Applications\QuoteWerks\	
Change	
	Back Next Cancel

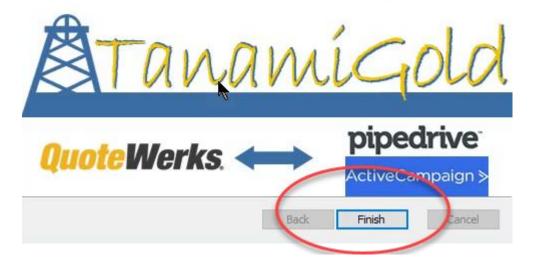
You are ready to go...

🚽 TanamiGold Setup		·		×
Ready to install TanamiGold	AT	anav	níG	ol
Click Install to begin the installation. Click Back installation settings. Click Cancel to exit the wi	to review or cha zard.	ange any of y	our	
	_			
Back	¢ (nstall	Canc	el
TanamiGold Setup		6 		×
Installing TanamiGold	AT	anav	nig	ol
Please wait while the Setup Wizard installs Tana				
Status: Copying new files				
•				
	Back	Next	Cano	el

🛃 TanamiGold Setup

Completed the TanamiGold Setup Wizard

Click the Finish button to exit the Setup Wizard.



Step 2 – Run NodeSetup.exe. Right click, Run As Administrator

Run NodeSetup.exe from all other workstations

App_LocalResources	22/03/2018 8:46 PM	File folder	
🔤 GoldRushTechnology.ico	17/04/2017 10:52	ICO File	5 KB
GRT.Common.dll	22/03/2018 8:33 PM	Application extens	24 KB
GRT.PipedriveAPI.dll	22/03/2018 8:33 PM	Application extens	33 KB
GRT.QuoteWerksAPI.dll	22/03/2018 8:33 PM	Application extens	27 KB
GRT.Ta amiGold.BusinessLayer.dll	22/03/2018 8:33 PM	Application extens	18 KB
🖄 GRT.TanamiGold.exe	22/03/2018 8:34 PM	Application	17 KB
🗟 GRT.TanamiGold.exe.config	17/04/2017 10:52	XML Configuratio	1 KB
GRT.Tani Type: XML Configuration File	21/03/2018 8:33 PM	Application extens	274 KB
Newtons Size: 525 bytes	02/2018 11:58 AM	Application extens	639 KB
NodeSetup:exe	2/03/2018 8:33 PM	Application	8 KB
🚯 NodeSet 🚬 🕫 NodeSet	30/01/2018 4:36 PM	XML Configuratio	1 KB
📄 Notes.txt	24/04/2017 5:12 PM	Text Document	1 KB
PipeDriveApi.dll	22/03/2018 7:00 PM	Application extens	133 KB
🚳 RateLimiter.dll	5/02/2018 11:58 AM	Application extens	15 KB
🗟 RestSharp.dll	5/02/2018 11:58 AM	Application extens	168 KB
🗟 System.ValueTuple.dll	5/02/2018 11:58 AM	Application extens	78 KB
📄 TanamaiGoldDebug.txt	22/03/2018 8:56 PM	Text Document	8 KB

Initial Setup

Selecting ActiveCampaign as your CRM

When the first master rights user runs QuoteWerks, they will be asked prompted with the TanamiGold Settings window, and will need to select ActiveCampaign, and add your ActiveCampaign account name then save their selection.

TanamiGold Settings (3.1.2)	×
Single Button Add to Quote	
Tax Handing when sending values to Pipedrive O Exclude Tax Include Tax 	
CRM ActiveCampaign V Save	
Account goldrushtechnologyptyltd	
Address Groups Cancel	Save

If you don't know your account name, In ActiveCampaign, go to Settings, then Developer. Under API access you will see the URL. You just need the name without the ".api-us1.com" extension.

≽	▲ Settings	Developer Settings
٩	Account	API Access
₽}.	Addresses	URL
M	Users and Groups Deals	https://www.api-us1.com
۲	Notifications	Key
\$	Advanced	
II.	Developer	Reset
:≣	Tracking	Need help? Check out our API Docs & Examples
∃	Conversations	Webhooks
Ш	Integrations	Manage Webhooks
	Conversions Saved Responses	Need help? Check out our Webhook Docs & Examples
	Calendar	
	Security	
D		
¢ 4		

🖄 TanamiGold Settings (3.1.2)	×
Single Button Add to Quote	
Tax Handing when sending values to Pipedrive O Exclude Tax Include Tax 	
CRM ActiveCampaign Change Account goldrushtechnologyptyltd]
Address Groups Cancel	Save

Entering your ActiveCampaign API Key

You will then be required to enter your ActiveCampaign API key, and each user will also need to do this on first use QuoteWerks after TanamiGold is installed, they will be presented by this screen:

🙇 User Settings (3.1.12)	×
User Email: john@goldrushtec	chnology.co.nz Help!
Default Task Days 3 🛓 Default Close Date Days 28 🜩	 Update CRM on AutoSave Not Using ActiveCampaign
 Doc Status Update CRM All Statuses Update CRM inclusions Update CRM exceptions 	Cancel

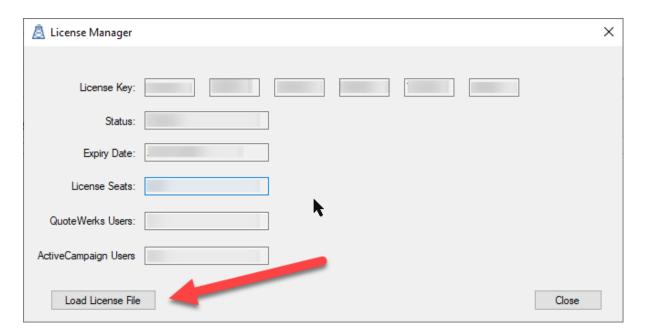
You need to enter your ActiveCampaign API key. To find out where to get this, if you click "Help!" you will see the help page that explains where to find this key. It's the same location as you found the account name.

≽	Settings	Developer Settings
٩	Account	API Access
	Addresses	
₽}	Users and Groups	URL
	Deals	https://liapi-us1.com
۲		Кеу
\$	Notifications	32985f3e /a530acf9
	Advanced	Reset
E.	Developer	
≣	Tracking	Need help? Check out our API Docs & Examples
E	Conversations	Webhooks
ш	Integrations	Manage Webhooks
	Conversions	Need help? Check out our Webhook Docs & Examples
	Saved Responses	
	Calendar	
	Security	
٥		
¢ 4		
	▼	

Then select API, and you can select your API key and copy and paste it into TanamiGold. You only have to do this once.

Loading your TanamiGold License File

After adding your API key, the next window will be the license manager, where you load your license file. Even if you are trialling TanamiGold, you need a license file.



Select the license file from where you have saved it

⇒ °т ⊑> Ini	s PC > Desktop		1 ×	ට Search D	esktop	۶
rganize 🔻 🛛 New folde	r		1			
This PC	Name	D- modified	Туре	Size		
3D Objects	a export.csv	5/12/2018 3:25 pm	Microsoft Excel C	2 KB		
	VNK85-XCMH1-AYSG9-0JXFD-XVTG8-LP	22/10/2019 4:55 pm	GRTLICENSE File	1 KB		
E Desktop	P1NN2-CB978-N2PG9-99TB5-TL2W6-5K0	22/01/2019 3:32 pm	GRTLICENSE File	1 KB		
Documents	H134A-3MTT1-37DG9-GEB46-SL9N0-95G	14/09/2018 4:07 pm	GRTLICENSE File	1 KB		
Downloads	GPNH9-BD334-NK009-GR76D-MNXCD-0	21/08/2019 5:58 pm	GRTLICENSE File	1 KB		
Music	F9RM3-YGJV5-ZVSG9-FJVV0-T1R09-6K38	12/09/2018 9:25 am	GRTLICENSE File	1 KB		
Pictures	OS473-E5WV2-6ST09-0K6SA-SBRPC-1PSV	5/05/2017 3:57 pm	GRTLICENSE File	1 KB		
	📑 warq10572.dta	8/10/2019 12:01 pm	DTA File	18 KB		
Sharepoint Appl	📄 wari10310-credit-pi.dta	8/10/2019 11:58 am	DTA File	18 KB		
Videos	📑 gatq1691-04.dta	12/09/2018 1:30 pm	DTA File	99 KB		
🏪 Local Disk (C:)	🔄 desktop.ini	6/10/2019 4:55 pm	Configuration sett	1 KB		
🛖 data (\\amos) (L	😭 XModProHelp04.07.01.chm	4/10/2016 4:12 pm	Compiled HTML	8,571 KB	2	
projects (\\amos	😭 qwapi.chm	28/08/2018 10:28 am	Compiled HTML	543 KB	2	
software (\\amo	😭 qwapi (2).chm	14/02/2018 5:22 pm	Compiled HTML	77 KB		
-	ConnectWise 2018.3.Data Dictionary.chm	5/04/2018 11:26 am	Compiled HTML	10,508 KB		
🛫 reference (\\amo	Microsoft Support and Recovery Assistan	8/02/2019 2:21 pm	Application Refere	1 KB		
📼 Extra (\\AMOS) (🎽	· · · · · · · · · · · · · · · · · · ·	1				
File na	me: VNK85-XCMH1-AYSG9-0JXFD-XVTG8-LPW02	.grtlicense				

Then select close, and you are all good to go!

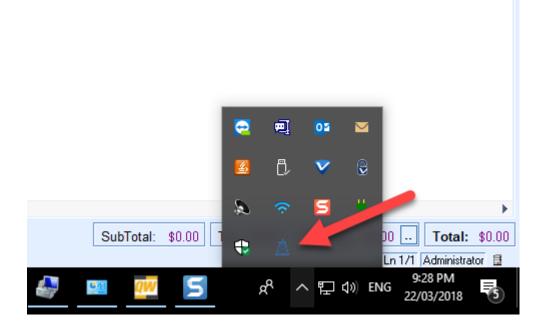
🙇 License Manager		×
License Key:	P1NN2 CB978	N2PG9 99TB5 TL2W6 5K04C
Status:	Current	Your license was successfully loaded
Expiry Date:	22/01/2020]
License Seats:	10]
QuoteWerks Users:	4]
ActiveCampaign Users	20	
Load License File		Close

Remember, each user will have to load their own API key.

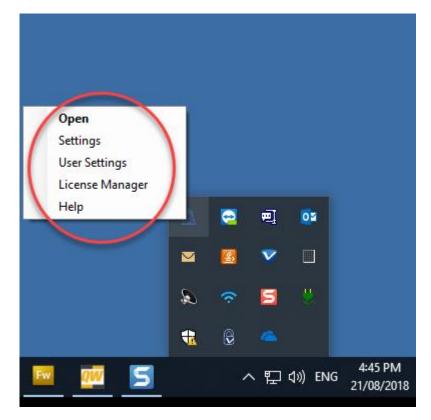
If you create a new user by cloning the user in the QuoteWerks User Maintenance screen, this will also clone the API key, so you will need to change this from the User Settings menu from the icon in the system tray. (See below)

Accessing the TanamiGold Settings

The settings are all managed from the menu accessed via the icon in the system tray.



Right click the icon to see the menu.



Menu Option – Open

Opens a window that shows you the status, and where you can access settings if you have Master Rights.

🖄 TanamiGold (3.1.2)	×				
Connected to QuoteWerks					
Connected to Active Campaign					
Settings User Settings Close					

Menu Option – Settings

These settings can only be managed by users who have QuoteWerks master rights. These settings apply to all users.

A TanamiGold Settings (3.1.2)	×
Single Button Add to Quote	
Tax Handing when sending values to Pipedrive O Exclude Tax Include Tax 	
CRM ActiveCampaign Change	
Account goldrushtechnologyptyt]
Data Link Mapping Address Groups Cancel	Save

Single Button Add to Quote

If you want to map specific ActiveCampaign fields to Ship To and Bill To addresses, you can use this setting so that you only add addresses to the Sold To address, and then use the Data Link Mapping to map ActiveCampaign fields to the Ship To and Bill To addresses.

🖄 TanamiGold Settings (3.1.2)	×
 Single Button Add to Quote Single Button Add Text: Add To Quote Tax Handing when sending values to Pipedrive Exclude Tax Include Tax CRM ActiveCampaign Change Account goldrushtechnologyptyltd 	k
Data Link Mapping Address Groups Cancel	Save

You can customise the label for the button.

Tax Handling

You can select whether the sales values sent to ActiveCampaign are exclusive or inclusive of tax.

Data Link Mapping

Data Link Mapping allows you to manage the flow of data between ActiveCampaign and QuoteWerks.

🙈 TanamiGold Data Link Mapping (3.1.2)						Х		
I	Data Link Mappings							
	QuoteWerks Field	DataType	Action	ActiveCampaign Entity	ActiveCampaign Field	ActiveCampaign Field Type	ActiveCampaign Writeble	1
	Add	Delete				Cancel	Save	

Fields mapped from ActiveCampaign to QuoteWerks the Contact Lookup button is pressed on the Sold To/Ship To tab from the Sold To, Ship To or Bill To address.

Sold to:		Ship to:		Bill to:	
Company		Company		Company	
Contact		Contact		Contact	
Title		Title		Title	
Address	Т	Address		Address	
	*				
City		City		City	
State	Zip	State	Zip	State	Zip
Country		Country		Country	
Phone	ext.	Phone	ext.	Phone	ext.
Mobile		Mobile		Mobile	
Fax	ext.	Fax	ext.	Fax	ext.
E-Mail		E-Mail		E-Mail	
Profile	•				

Fields are mapped from QuoteWerks to ActiveCampaign when a quote is saved and the deal is updated.

The mappings can be specific to the actions, RetrieveSoldTo, RetrieveShipTo and RetrieveBillTo, or you can use the option RetrieveAddress, and it will map the fields when any of the three lookup buttons are clicked.

🙇 Add Mapping (3.1	.1)			×
Action	****Select****	~		
QuoteWerks Field CRM Field	RetrieveSoldTo RetrieveSoldTo RetrieveShipTo RetrieveBillTo RetrieveAddress SaveDocument	k	~	
			Cancel Ad	d:

Add Mapping

To add a mapping, use the Add button (obvious I know).

Select the action you want the mapping to operate on.

Select the QuoteWerks field you want. The fields that start with "***" are generic address fields, so you can map to the ShipToTitle field when the ShipTo lookup is clicked.

🙇 Add Mapping (3.0.3	3)	×
Action	Retrieve Address 🗸	
QuoteWerks Field	****Select****	
CRM Field	Select Address1 Address2 Company Company Contact Country	Add .::

Select the ActiveCampaign field you want to map. You will only see the ActiveCampaign fields that match the QuoteWerks field data type, i.e., text to text, number to number, date to date.

There are some ActiveCampaign fields that aren't supported by QuoteWerks, so you won't see them in the list.

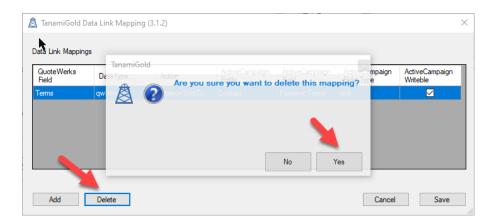
Once you have made your selection, click Add.

🙇 Add Mapping (3.1.2)			×
Action	RetrieveSoldTo ~	N.	
QuoteWerks Field	Tems	~	
CRM Field	Contact - Payment Terms	~	1
		Cancel	Add

Delete Mapping

To remove a mapping, select the mapping and click delete.

You will be asked to confirm the delete before it happens.



Editing a Mapping

To edit a mapping, simply delete it and add it again.

Note of Caution

You can select both ActiveCampaign fields and QuoteWerks fields more than once. This will over-write values, so be careful.

Address Groups

Address groups allow you to map a set of text fields in ActiveCampaign as a single address. The ActiveCampaign address type field uses the Google Maps API to split the address into its sub-fields. However, this sometimes is not that helpful, and it's easier to use your own separate text fields. However, when adding the address to QuoteWerks, you need to know they are related.

Add Address Group

You need to give the address group a name, like "Postal Address", select the entity that the address is defined on, either Account, Contact or Deal, then select the fields that are related to the address, in this case, the Postal Address

💀 Add Address Group	0		_		×
Address Coup Name:	Postal Address				
Entity:	Account	\sim			
Address1:	Address 1				\sim
Address2:	Address 2				\sim
Address3:	***None***				\sim
City:	City				\sim
State:	State/Province				\sim
Postal Code:	Postal Code				\sim
Country:	Country				\sim
		Canc	el	OK	

You don't have to map every field. The fields will map the corresponding field in the QuoteWerks Address.

Edit Address Group

When you edit the address group, you can change its name, and you can change the fields, but you can't change the entity.

Delete Address Group

To delete an address group, select it, then click "Delete". You will be prompted to confirm the delete before it happens.

) / Ship to	🥥 Sale Info 📔 Notes 🛛 🚰 Custom 🛛 🛍 Links	
🛕 Tar	amiGold Settings (3.0.3)	× _{ons}
	Address Groups (3.0.?)	Remove Monthly
Ta	Are you sure you wa	int to delete this mapping?
۲	Postal Address	
CF		No
	Add Edit Delete Cancel ata Link Mapping Address Groups Cancel Save	ОК
	ata Link Mapping Address Groups Cancel Save	
	Refra	ch Lease Paument Options

Menu Option – User Settings

The User Settings apply to each QuoteWerks user.

🖄 User Settings (3.1.2))		×
User Email:	help@goldrushtechr	nology.com.au	
API Token:	9f80c011e1c0112b	0097306329a4a5fd	Help!
Default Task Days	2 ≑	Update CRM	on AutoSave
Default Close Date	Days 28 🜲	Not Using Ac	ctiveCampaign
Doc Status			
Update CRM	All Statuses		
O Update CRM i	inclusions	N	
O Update CRM	exceptions		
		Cancel	Save

Default Task Days

This value will be added to the current day when creating tasks, when you are saving a quote. So if you normally follow up quotes after 4 days, you can change this value to suit your sales needs. The default is 2.

Default Close Date Days

This value will be added to the current day when selecting to add a Close Date. The default is 28.

Update CRM on AutoSave

By default, the update to ActiveCampaign is now disabled on Autosave. You can turn this on. You will need to restart QuoteWerks for this to take effect.

Not Using ActiveCampaign

You may have users who use QuoteWerks, but don't use ActiveCampaign. Selecting this field will stop TanamiGold running when QuoteWerks starts.

For obvious reasons, because TanamiGold no longer runs for this user, to change this, you need to do this via the QuoteWerks Settings Manager.

In QuoteWerks, as a master rights user, go to the Settings Manager in Help, About.

Select the User Settings Table, and then select the User.

Select the TanamiGold section, then select the ActiveCampaign User Settings, and delete them use the "X" button.

		sers only. Improper settings changes can start QuoteWerks for them to take effect.	cause serious issues. Most of the sett	ings Ru	un QuoteWerks Command
able	UserSettings	User Administrator	•		
ction	<anv></anv>				
ettings	¢ 📀 🕒 🔇 📹	_			spotlight search
	SectionName	KeyName	KeyValue	UserName	LastModified
	Native Product Columns	ColumnData	ManufacturerPartNumber,1500Desc	Administrator	2017-06-12 08:51 pm
	ShareWerks	UserName		Administrator	2018-03-09 03:08 pm
	Sharewerks	[]serPassword		Administrator	2018-03-09 03:08 pm
	TanamiGold 🔰 🧹	PipedriveUserSettings	<pipedriveusersettings><useremail>j</useremail></pipedriveusersettings>	Administrator	2018-03-22 08:25 pm
	Usage	LastinunVersion	5.3.3.09	Administrator	2018-03-22 09:21 pm
	Usage	NumTimesRun	92	Administrator	2018-03-22 09:21 pm
	Usage	TotalTimeRun	30600	Administrator	2018-03-22 09:15 pm
	UserConfig	AutoCloseBundleWindow	-1	Administrator	2018-03-09 03:08 pm
	UserConfig	AutoClosePrintWindow	-1	Administrator	2018-03-09 03:08 pm
	UserConfig	AutoDisplayActiveQuotesPanel	-1	Administrator	2018-03-09 03:08 pm
	UserConfig	AutoExpandLiteratureFolders	0	Administrator	2018-03-09 03:08 pm
	UserConfig	AutoExpandProductFolders	-1	Administrator	2018-03-09 03:08 pm
	UserConfig	AutoOpenQuoteValetDashboardOnStart	0	Administrator	2018-03-09 03:08 pm
	UserConfig	ColorizePDFURLs	-1	Administrator	2018-03-09 03:08 pm
	UserConfig	ConfigurationLinkHandleSize	0	Administrator	2018-03-09 03:08 pm
	UserConfig	ConfirmBeforeExiting	0	Administrator	2018-03-09 03:08 pm
	UserConfig	DefaultAdditionalLayoutFilterToAll	0	Administrator	2018-03-09 03:08 pm
	UserConfig	DefaultEditContactTab	1	Administrator	2018-03-09 03:08 pm
	UserConfig	DefaultPrimaryLayoutFilterToAll	0	Administrator	2018-03-09 03:08 pm
	UserConfig	DefaultQUOTECoverPage	SH.CoverPage.V1.3.doc	Administrator	2017-11-24 02:08 pm
	UserConfig	DefaultQUOTEPrintLayout	sh.guote.v1.0.fpc	Administrator	2017-06-12 08:51 pm
	UserConfig	DefaultWorkBookTab	1	Administrator	2018-03-09 03:08 pm
	UserConfig	DocumentSearchDefaultTemplate	AllDocuments	Administrator	2018-03-09 03:08 pm
	UserConfig	DoNotAllowCopyPDFContent	0	Administrator	2018-03-09 03:08 pm
	UserConfig	DontRememberWindowLocation	-1	Administrator	2018-03-09 03:08 pm
	UserConfig	EmbedFontsInPDF	0	Administrator	2018-03-09 03:08 pm
	UserConfig	EnableAddItemAssistant	-1	Administrator	2018-03-09 03:08 pm
	UserConfig	EnableAutoSave	0	Administrator	2018-03-09 03:08 pm
	UserConfig	EnableCompareAssistant	0	Administrator	2018-03-09 03:08 pm
	UserConfig	EnableDoubleClickF2LookupInTextBoxes	-1	Administrator	2018-03-09 03:08 pm
	UserConfig	EtilizeAutoRetrieveRealtime	0	Administrator	2018-03-09 03:08 pm
	UserConfig	FileLinksDefaultToCentralizedStorage	0	Administrator	2018-03-09 03:08 pm
	UserConfig	KeepOptionalItemsOptionalByDefault	0	Administrator	2018-03-09 03:08 pm
	UserConfig	MakePDFReadOnly	-1	Administrator	2018-03-09 03:08 pm
	UserConfig	MergePDFFileLinksWithQuote	-1	Administrator	2018-03-09 03:08 pm
	11ec.	NELEDDER Sterne Ströken	1	A destroyees	2010/02/00 02:00

The next time the user starts QuoteWerks they will be asked to enter their API key.

Doc Status

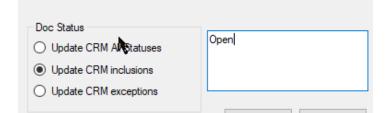
By default, the Update ActiveCampaign Deal occurs for every document status. However, if you often work on large quotes, that you need to save often, it can be annoying having the Update ActiveCampaign Deal window pop up on every save.

If you want to change this there are two options.

Update CRM inclusions

With this option, the Update ActiveCampaign Deal will only happen if the document status is in the list of statuses.

In following example, it will only happen if the status is Open.



In following example, it will only happen if the status is Open, Lost or Closed.

Doc Status Update CRM All Statuses Update CRM inclusions Update CRM exceptions	Open Lost Closed
O Update CRM exceptions	

Please note, the statuses you type are not validated, so if you use this option, and don't list a valid status, then the Update ActiveCampaign Deal window will never pop up.

The values are not case sensitive.

Update CRM exceptions

With this option, the Update ActiveCampaign Deal will only happen if the document status is not in the list of statuses.

In the following example, it will happen every time, unless the status is Draft.

Doc Status	
O Update CRM All Statuses	Draft
O Update CRM inclusions	
Update CRM exceptions	

Menu Option – License Manager

You can access the license manager if you have QuoteWerks master rights.

🙇 License Manager		×
License Key:	P1NN2 CB978 N2PG9 99TB5 TL2W6 5K04C	
Status:	Current	
Expiry Date:	22/01/2020	
License Seats:	10	
QuoteWerks Users:	4	
ActiveCampaign Users	20	
Load License File		Close

Menu Option – Help

This opens this help file.

Contact Search

Accessing the Contact Lookup Window

From the Sold To/Ship To tab, you can use the search button to open the Contact Lookup window.

Sold to:		Ship to:		Bill to:	
3	P 📲 🛞 🎤 🏈 🔍		🛃 • 🖳 🕺 🎮 💸 🔍		🛃 + 🖳 🕺 🎮 🚿 🔍
Company		Company		Company	
Contact		Jon. 1		Contact	
Title		Title		Title	
Address		Address		udress	
City		City		City	
State	Zip	State	Zip	State	Zip
Country		Country		Country	
Phone	ext.	Phone	ext.	Phone	ext.
Mobile		Mobile		Mobile	
Fax	ext.	Fax	ext.	Fax	ext.
E-Mail		E-Mail		E-Mail	
Profile	•				
]				

Or you can use either of the Contact buttons from the main menu

Indes	Window <u>H</u> el	p										
						\odot		Ś	Ś	<u>_</u>	1	sage 50
ver	Dashboard	Products	Bundles	Configurator	Best	Latest	Compare	Contacts	Contact	Purchasing	QuickBooks	Peachtree
urer Pa	ant# 👻 Sea	arch For		0								
🕽 Sale	Info 📔 No	tes 🛛 😤 🌢 Site	e information	🛃 Links								
				D:11 h-1								
to:				Bill to:								
	o la	• 🖳 🐼	Pg 🖑 🔍			🛃 🔹 📑 😣	- 1 🗣 🔍					
bany				Company								

Or you can use the Lookup Contact menu option in the Contacts Menu

🚾 QuoteWerks -	[Untitled Q	uote <	UNSAVED)>]			
♥₩ <u>F</u> ile <u>E</u> dit <u>V</u> iew	Products	Tools	<u>C</u> ontacts	<u>R</u> eports	<u>U</u> tilities	<u>W</u> indow	Help
New	Open	Save	<u>R</u> et	kup contac rieve Curre E Center	ent Conta	ct	Pro
	@Databuild	Parts	<u>S</u> et	up Contact	t Manager	·	

ActiveCampaign Contact Lookup

🙇 ActiveCampaign Contact Lookup (3.1.2)	\times
Search	
Deals Addresses Fields	
Sold To Ship To Bill To All Close	:

To search, select either Account or Contact.

Enter your search string in the search window.

When you want to search, click on "Search", or press <Enter>.

		No addre	əssəs four	nd!!!	
LOTR Good Guys	Bilbo Baggins	bilbobaggi	ns@gmail.c	0123 4	56 789
	R				
Deals Addresses	Fields				
Deals Addresses Bilbo Baggins 6	Fields	\$100.00	USD		14/11/2019
Deals Addresses Bilbo Baggins 6 Bilbo Baggins 4	Fields	\$100.00 \$0.00			14/11/2019 14/11/2019
Bilbo Baggins 6	Fields		AUD		
Bilbo Baggins 6 Bilbo Baggins 4	Fields	\$0.00	AUD AUD		14/11/2019

When you select a contact, it will search for all related Deals, Addresses and Mapped Fields.

If there is a deal, it will be selected.

If you already have a Company/Account or Contact in the address field, the search will search for this entity automatically. This is particularly useful if you change some details of the contact in ActiveCampaign, and nee to refresh your quote.

ActiveCampaign Con	ntact Lookup (3.1.	2)			×
Bilbo Baggins		No addre	esses found!!!	Search	
LOTR Good Guys	Bilbo Baggins		e@gmail.c 0123	456 789	
				-	
			R		
Deals Addresses	Fields				
Bilbo Baggins 6		\$100.00	USD	14/11/2019 ^	
Bilbo Baggins 4				14/11/2019	
Bilbo Baggins 3		\$0.00	AUD	14/11/2019	
Bilbo Baggins 2		\$0.00	AUD	14/11/2019	
Bilbo Baggins -		\$0.00	AUD	14/11/2019 🗸	
Clear Deal	Sold To	Ship To Bill	To All	Close	

All address fields associated with the selected organisation, Contact and deal will be found.

ActiveCampaign	Contact Lookup (3	3.1.2)			
Bilbo Baggins	•			Searc	h
LOTR Good Guys	Bilbo Baggins	s bilbobi	aggins@gmail.c	0123 456 789	
Deals Addresse	🛤 Fields				
			Hobbiton		

The fields tab will show you any Mapped Fields that will be copied to the quote. If the mapped fields value is not set, nothing will be copied.

OTR Good Guys	Bilbo Baggins	bilbobaggins@gmail.c	0123 456 789
Deals Addresses	Fields		
Deals Addresses RetrieveAddress	Fi elds	Strictly COD	
		Strictly COD	
		Strictly COD	

When you save the quote, you can change the deal, or you can create a new deal when you save the quote.

Fields are copied, and the deal is linked when you click on "Sold To" or "All" buttons.

You can select different addresses and contacts to add to "Ship To" and "Bill To".

Updating ActiveCampaign When Saving A Document

When you save your quote, if it's linked to a ActiveCampaign contact, you will see the following screen:

🙇 Update A	ctiveCampaign Deal (3.1.2)		×
Deal Tasks	Add Note Fields		
Deal Title	Bilbo Baggins 6		Change
Pipeline	TanamiGold	~]
Stage	To Contact	~	
Deal Value Deal Status Open	\$100.00	Quote Total \$228,841.09	
			k
		Cancel	Update

Updating the Deal

Deal Tab

Changing the Deal

When you are saving the document, you can change the deal, to either an existing deal, or create a new one.

To change to an existing deal, select "Change", select the deal from the dropdown, and then select "Save".

ctiveCampaign Deal (3.1.2)	\times
Add Note Fields	
Bilbo Baggins 6	Change
ctiveCampaign Deal (3.1.2)	×
s Add Note Fields	
Bilbo Baggins 4	Save
Test2	
	~
Bilbo Baggins 3 Bilbo Baggins - Bilbo Baggins 2	~
	Add Note Fields Bilbo Baggins 6 CtiveCampaign Deal (3.1.2) Add Note Fields Bilbo Baggins 4 Test Test2 Bilbo Baggins 6 Bilbo Baggins 4 Bilbo Baggins 4 Bilbo Baggins -

You can then change any other of the deal values, before clicking on "Update"

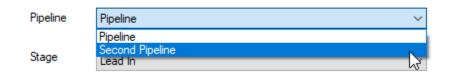
To create a new deal, after clicking on "Change", just type in the new deal name, then save:



When you click on "Update" the new deal will be created.

Pipeline & Stage

To change the Pipeline the deal is on, just select the new pipeline from the dropdown.



When you change the pipeline, the stage will default to the first stage on the new pipeline.

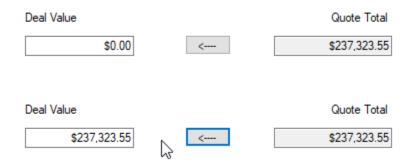
Just select the new stage from the dropdown list.

Pipeline	Second Pipeline ~
Stage	Enquiry ~
	Lead
	Enquiry
Close Date	Quoted
	Viewed/In Progress 서
	Won
Probability	Completed

Deal Value

You can set the deal value by entering a value in the text box, or by copying the total value of the quote by pressing the "<---" button.

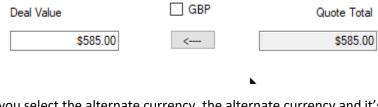
The amount will either include or exclude tax based on the Settings, set by your administrator.



Managing Alternate Currencies

If you have alternate currency selected, you can update the deal using this currency rather than your default currency.

The following example is using your default currency, even though the alternate currency of GBP is selected on the quote.



If you select the alternate currency, the alternate currency and it's value is updated to the deal.



If the deal is using a different currency that the default or alternate currency it is shown o the Deal Value.

 CAD
 Quote Total

 \$156,719.45
 <----</td>
 \$585.00

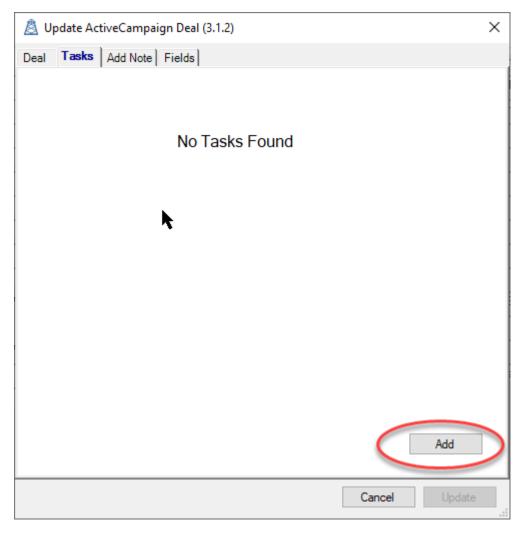
Deal Status

You can change status of the deal from Open, to Won or Lost, or if it already has been set, you can re-open it.

Deal Status		
● Open 🔾 W	on 🔿 Lost	

Tasks Tab

The Tasks tab allows you to manage the tasks that have been created for the deal, and to create new ones.



Add a task

When you click add, you can create a new task in ActiveCampaign, linked to the deal.

🖄 Add Task		×
Subject	Bilbo Baggins -	
Туре	Call ~	
Assign To	John Jacobson 🗸	
Date	-Exp Date	
		-
Notes	I	
	Cancel Add+New OK	

- The subject defaults to the deal title
- Use "Type" to select the type of task you wish to create
- "Assign To" specifies which ActiveCampaign user is assigned to the task
- The date will default to the number of days after the current day, as specified by the DefaultTaskDays User Setting if you just click on the date. Or you can automatically apply the Expiry Date from the Quote, and then adjust as required.
- When you select a date, you then can specify a time and duration, or you can clear the date using the Clear button

Date	Tuesday , 18 September 2018	Clear
Time	12:00:00 AM	
Duration	00:30 ~	

- The "<-Exp Date" button allows you to add the quote Expiration date as the task date. This makes it easier to then select a few days either side of that date.
- "Notes" is any additional notes you want to make in relation to the task and is optional.
- "Add+New" will add the task, and then leave the window open (with all the same values), to allow you to add another task.
- "OK" will add the task and close the Add window.

When you have tasks, you can manage them by selecting the task, and the right click, to see the context menu.

₿	Update A	Acti	veCampa	aign	Deal <mark>(</mark> 3.1.2)						\times
Dea	al Task	s	Add Note	Fi	elds						
	Due Date	-	Туре		Subject					Comple	
	30/11/20)	Call		Bilbo Baggins -		Add				
							Add				
							Delete				
							Done				
						-		-			
										Add	
								0	Cancel	Update	

Edit a task

Selecting "Edit" will bring up the task and let you change any of the values.

Delete a task

Selecting "Delete" will delete the task.

Completing a task

Selecting "Done" will mark the task as completed.

Note Tab

If you want to add a note to a deal, just enter the text in the text area.

Update ActiveCampaign Deal (3.1.2)	×
Deal Tasks Add Note Fields	
This is my note	
▶	
Cancel Update	

The note will be added when you click the "Update" button to update the deal.

Fields Tab

The fields tab will show you what values will be updated in ActiveCampaign. This managed by the Data Link Mappings in Settings, which is done by your administrator.

🖄 Update ActiveCampaign Deal (3.1.2)									
Deal	Deal Tasks Add Note Fields								
	QuoteWerks ActiveCampaign Field Value								
	ExpirationDate	Deal	My Date Field	12/12/2019					
		•							
		R							
					_				
				Cancel Upo	date:				

Support

If you have any support questions or issues, please email <u>help@goldrushtechnology.com.au</u>

Or visit our website at <u>www.goldrushtechnology.com.au</u>