TanamiGold

QuoteWerks ⟷ **pipedrive**
ActiveCampaign ≫

User Manual
Version 3.1
for ActiveCampaign

Gold Rush TECHNOLOGY

www.goldrushtechnology.com.au

Contents

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.

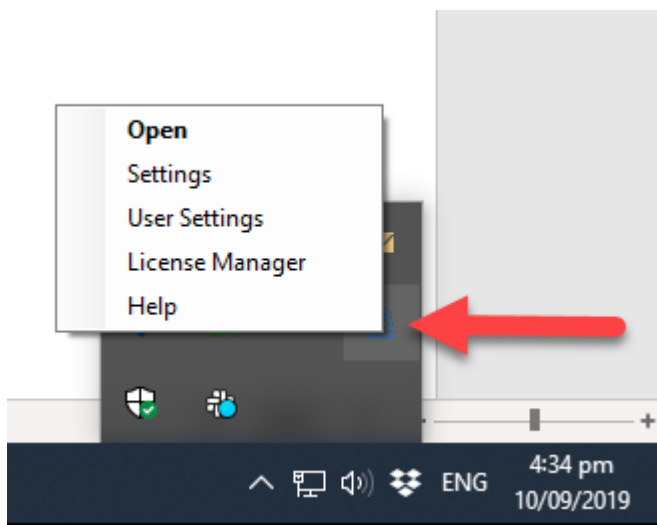There are four basic times that TanamiGold passes data between your CRM.

- 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.

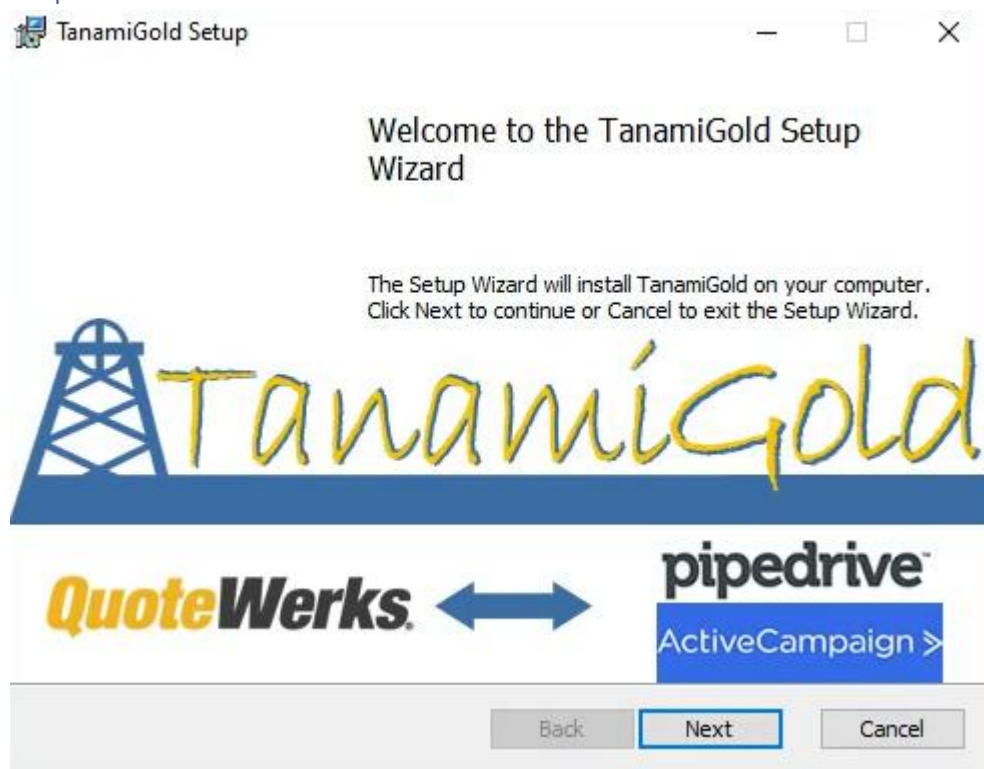TanamiGold is managed via an icon in the Windows System Tray.

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.
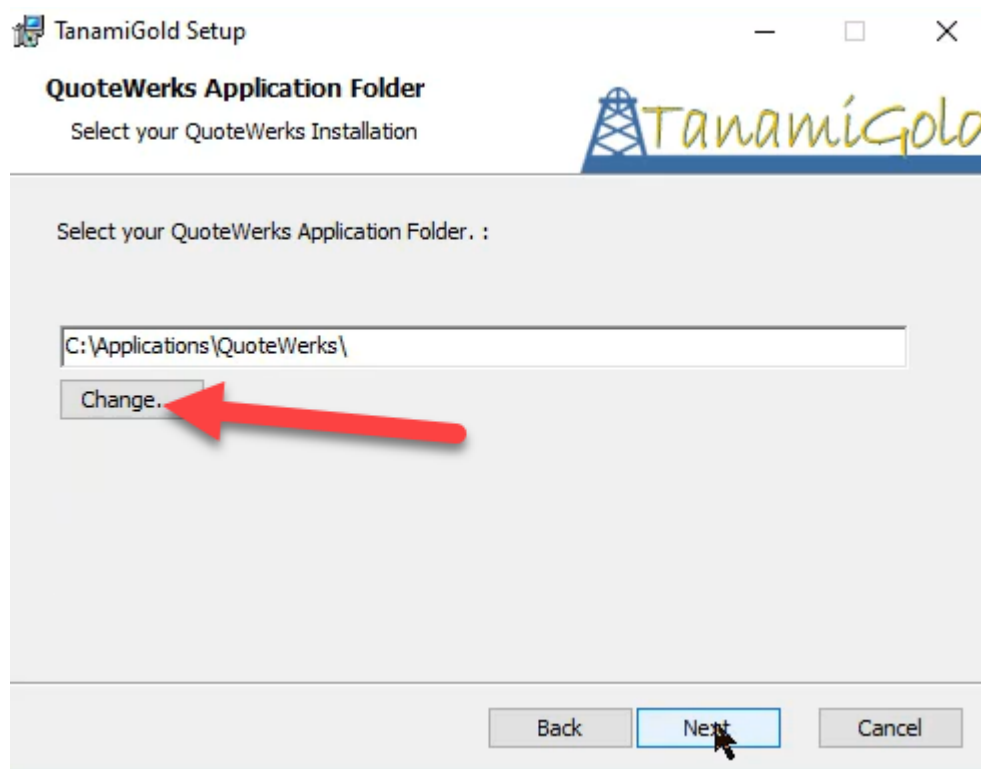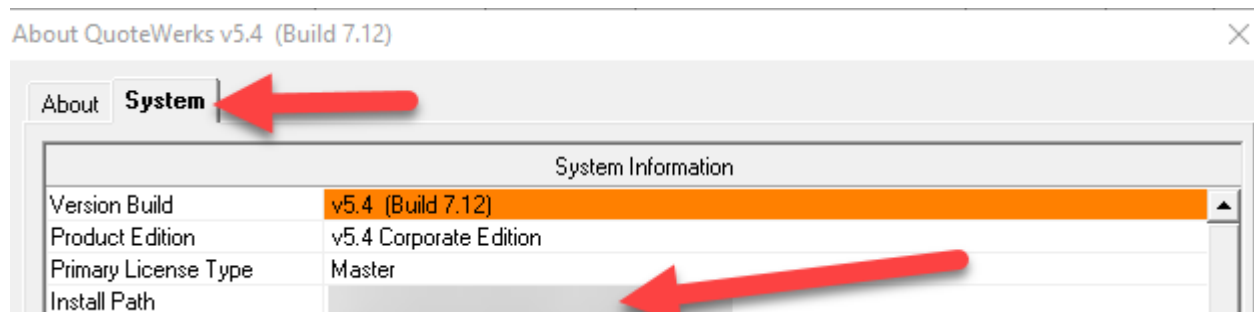
Step 1 – Run the Installer

Accept the End User License Agreement

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.
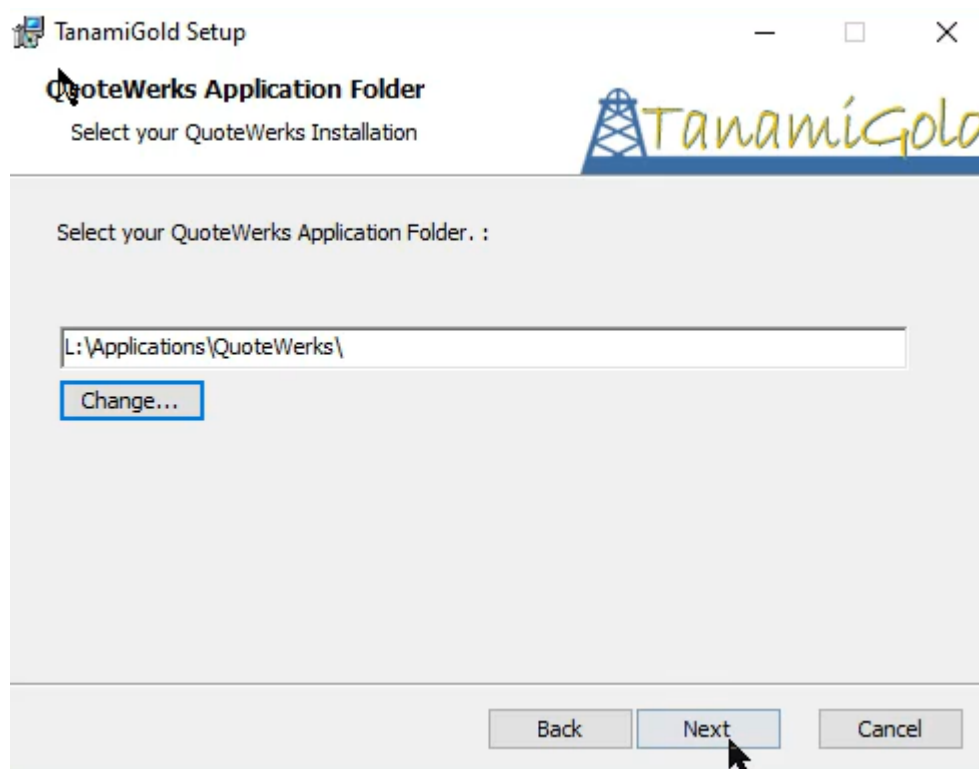

If you need to, change to your QuoteWerks Application folder. If you aren't sure what this folder is, in QuoteWerks, go to Help, About, Then Select the System Tab.
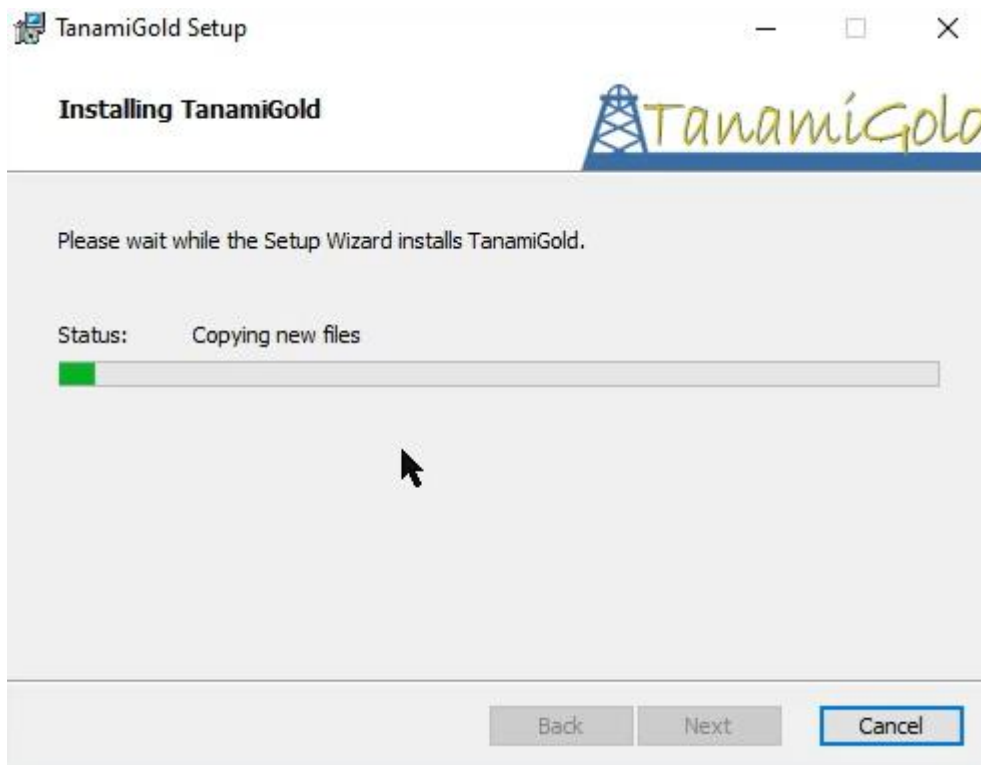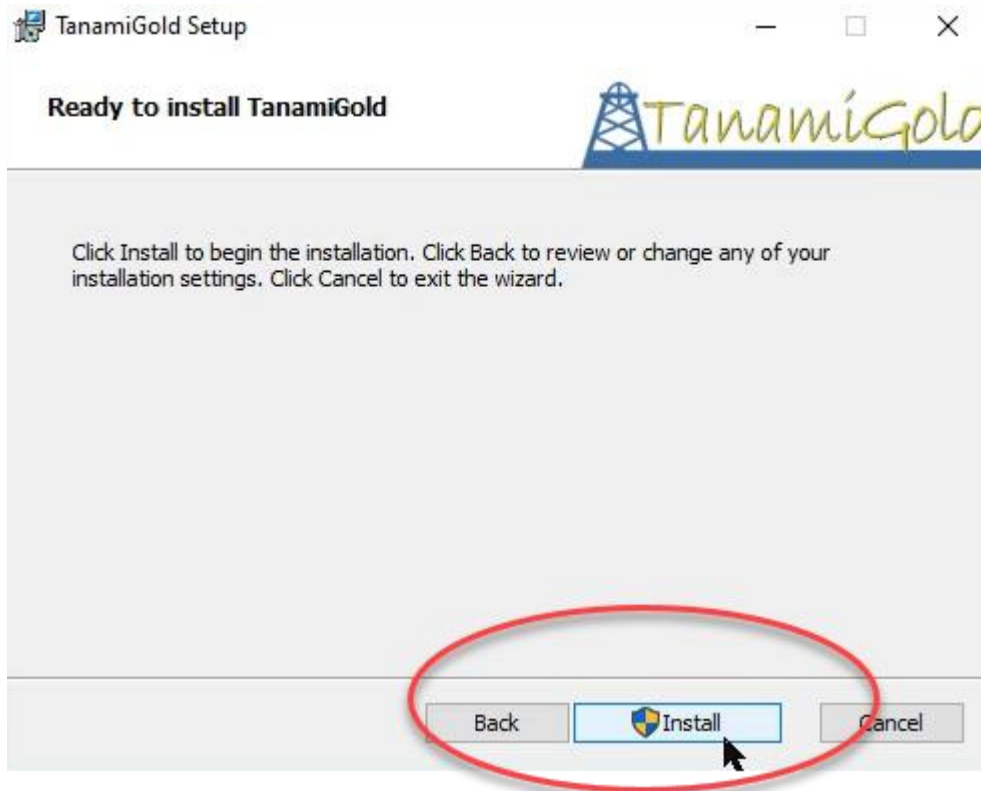
Navigate to your current QuoteWerks Installation, usually on your Network Server (but not always)
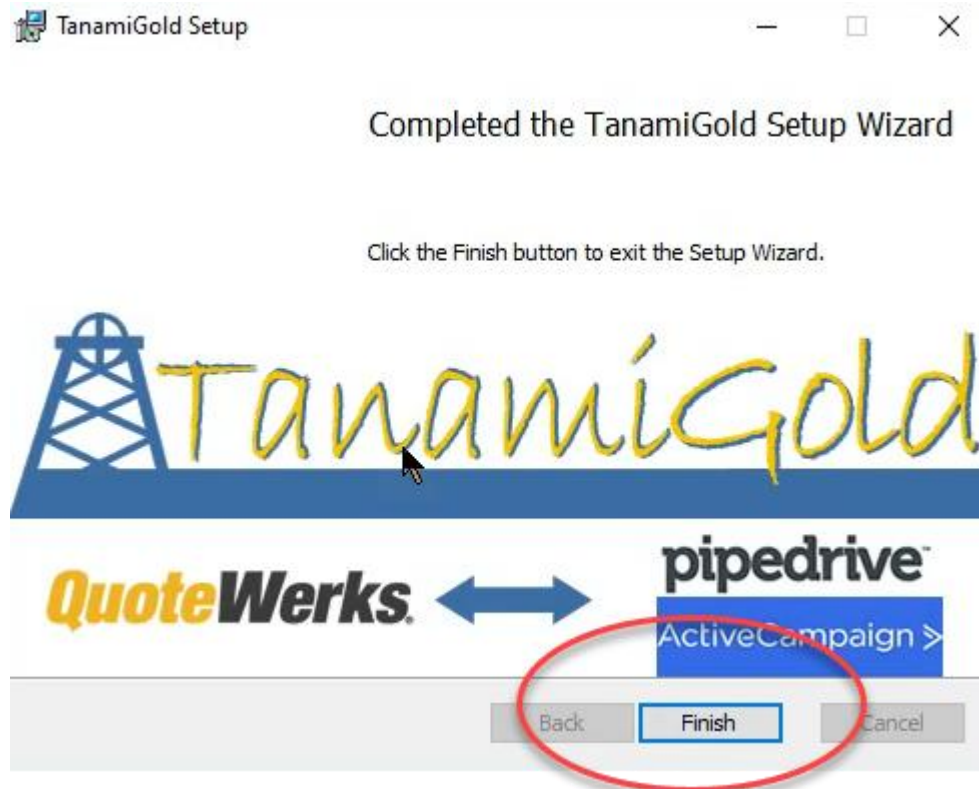

Then Click Next…
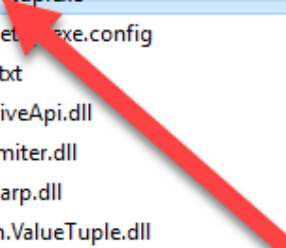
You are ready to go…

All done…

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

Run NodeSetup.exe from all other workstations

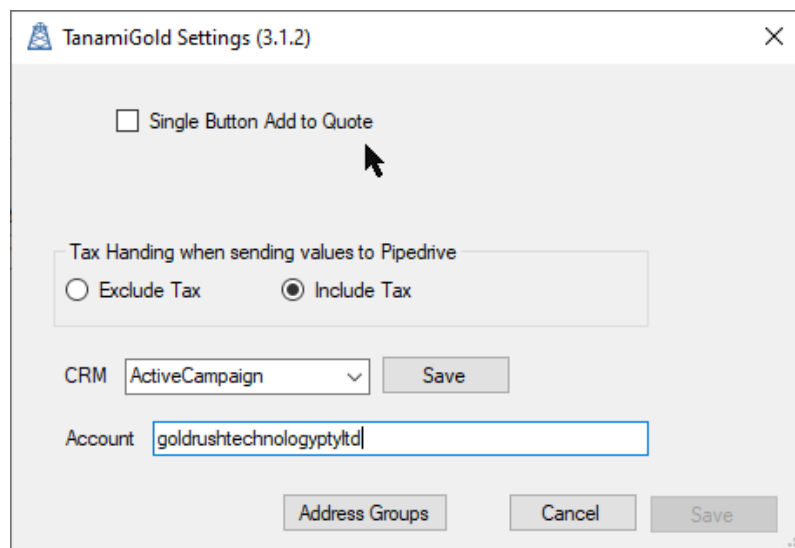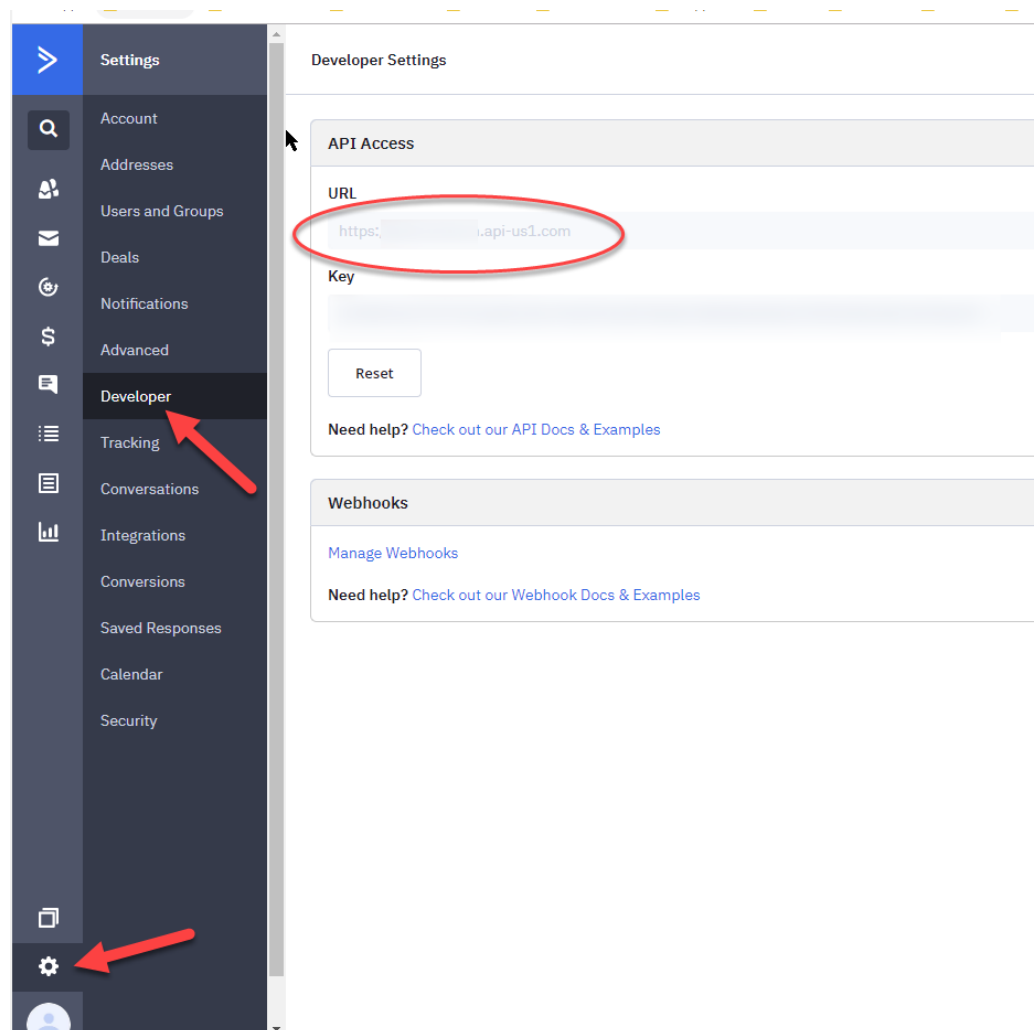| App_LocalResources | 22/03/2018 8:46 PM | File folder | |
GoldRushTechnology.ico	17/04/2017 10:52 ...	ICO File	5 KB
GRT.Common.dll	22/03/2018 8:33 PM	Application extens...	24 KB
GRT.PipedriveAPI.dll	22/03/2018 8:33 PM	Application extens...	33 KB
GRT.QuoteWerksAPI.dll	22/03/2018 8:33 PM	Application extens...	27 KB
GRT.TanamiGold.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.Tana...	Type: XML Configuration File	2/03/2018 8:33 PM	Application extens...	274 KB
Newtons...	Size: 525 bytes	02/2018 11:58 AM	Application extens...	639 KB
NodeSetup.exe	Date modified: 17/04/2017 10:52 AM	22/03/2018 8:33 PM	Application	8 KB
NodeSetup.exe.config	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.

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.

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:
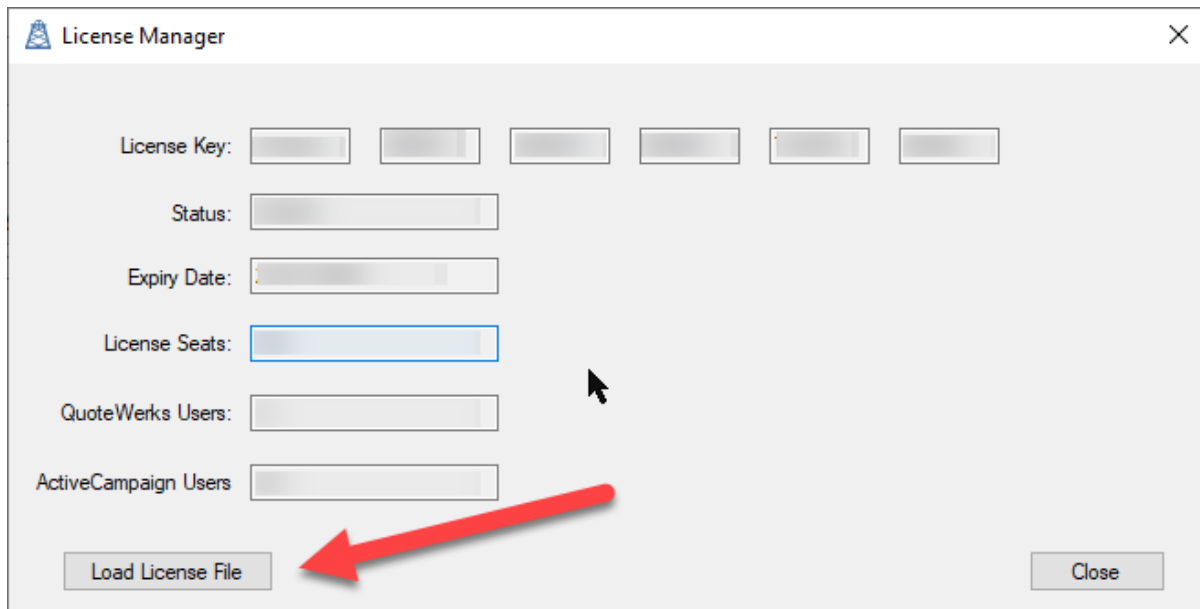

You need to enter your ActiveCampaign API key. To find out where to get this, if you click "Help!" you will see the help page that explains where to find this key. It's the same location as you found the account name.
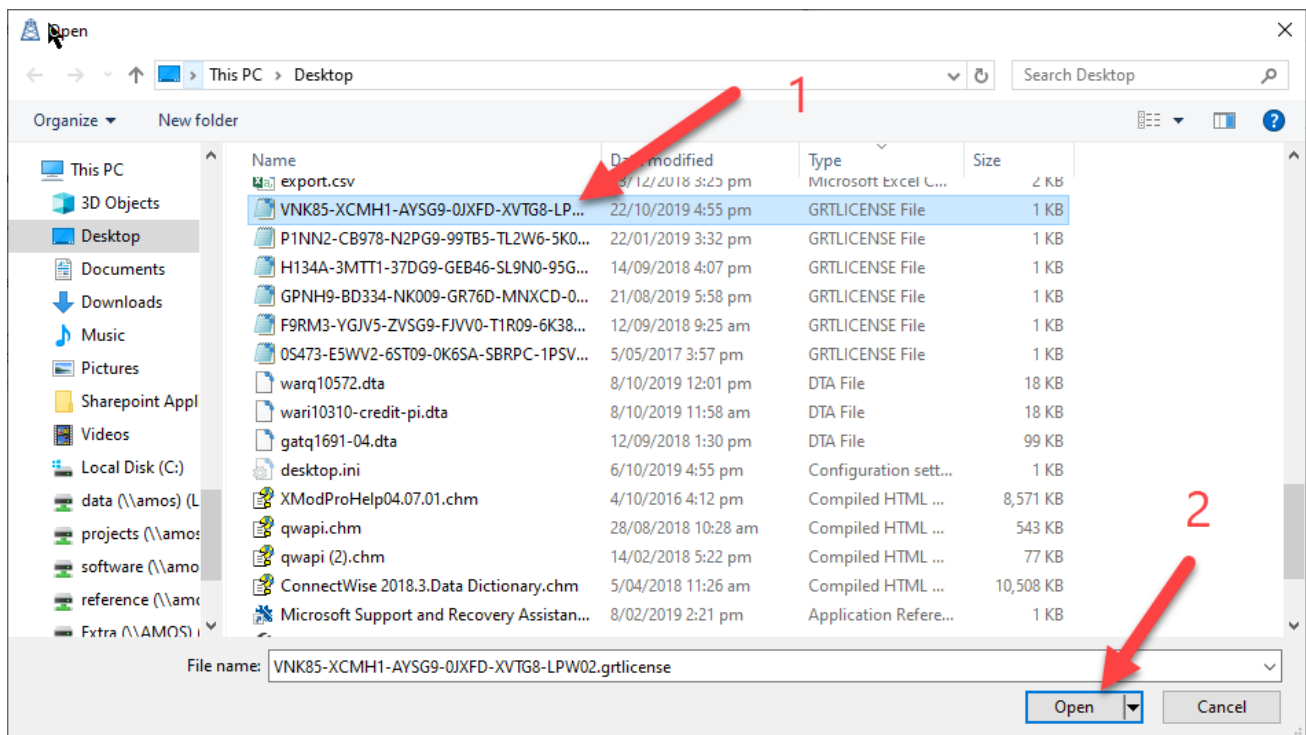
Then select API, and you can select your API key and copy and paste it into TanamiGold. You only have to do this once.
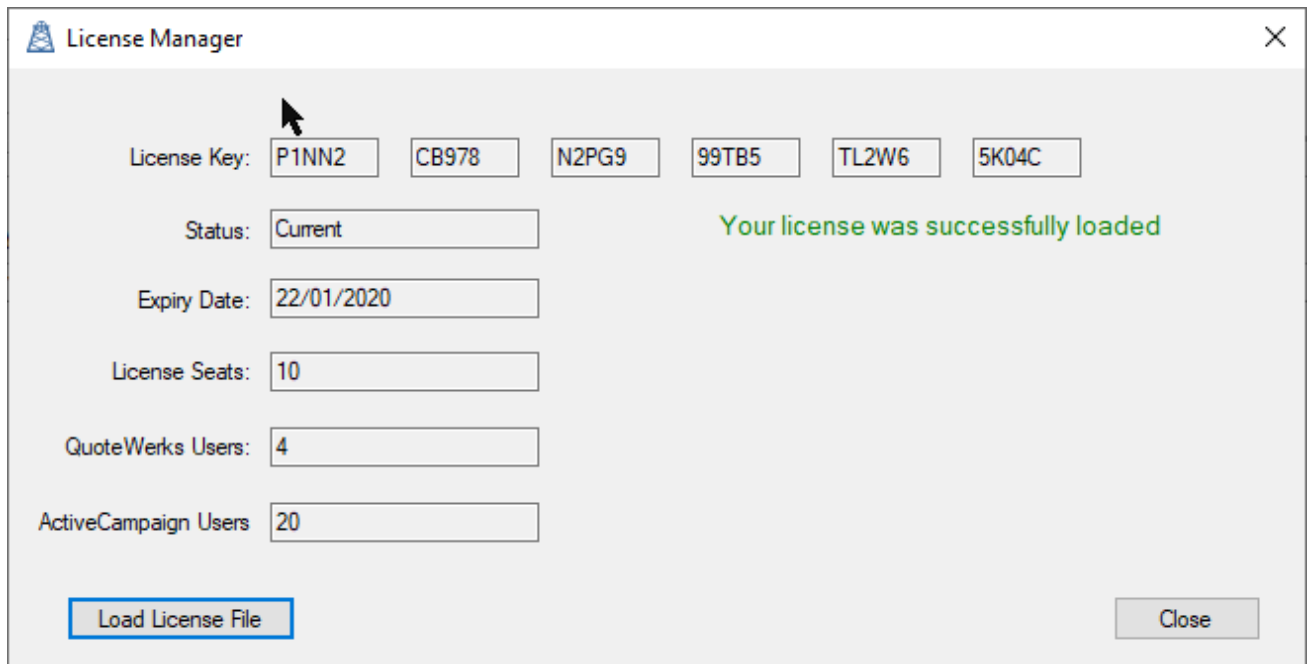
Loading your TanamiGold License File

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

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

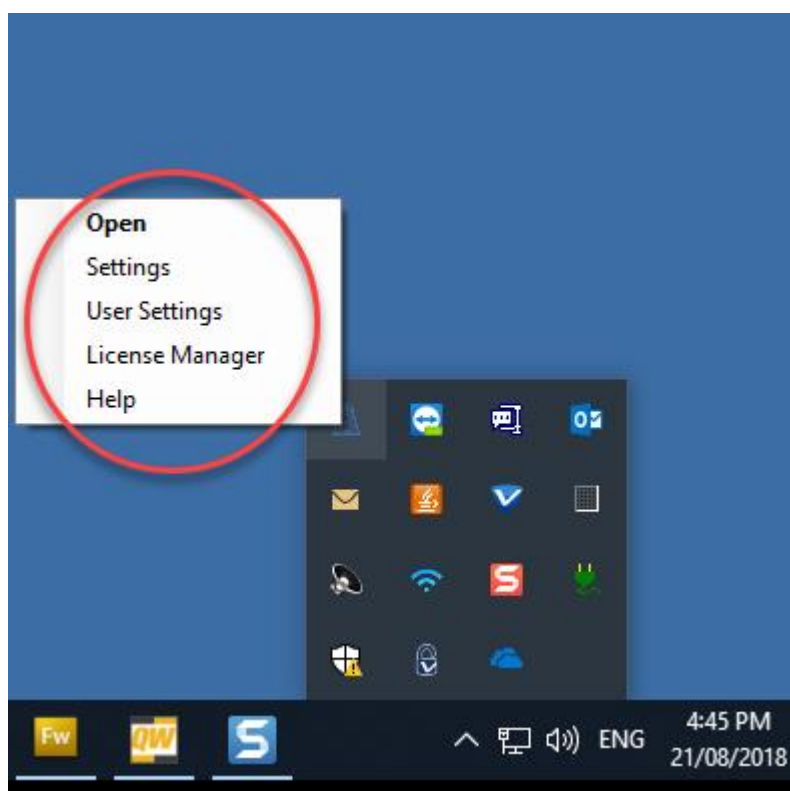Remember, each user will have to load their own API key.

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.
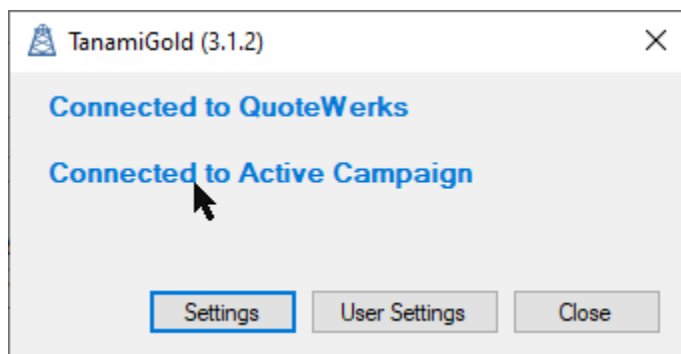

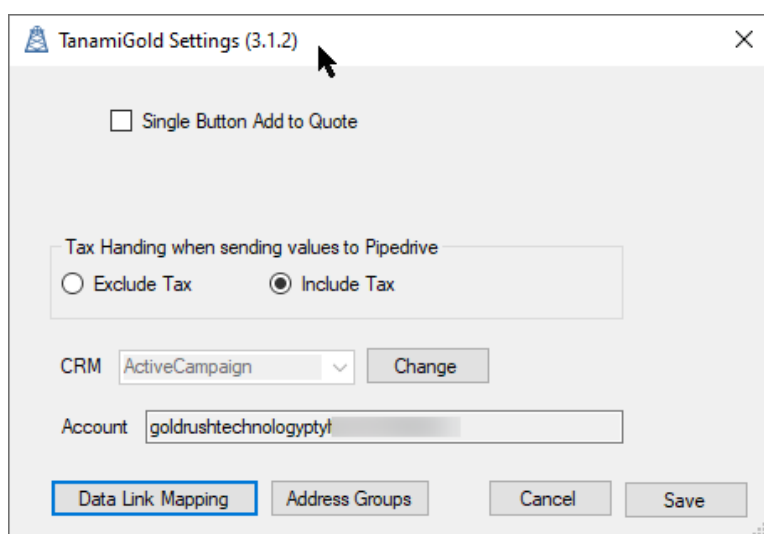Right click the icon to see the menu.

Menu Option – Open

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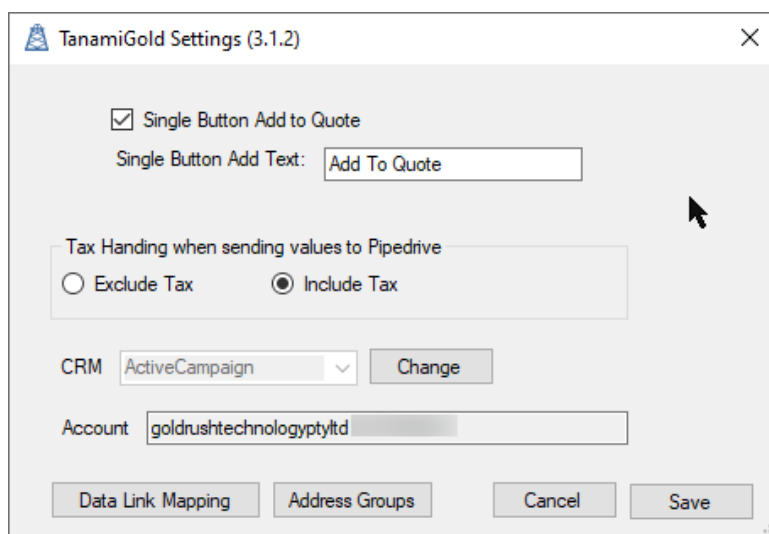

Menu Option – Settings

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

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.

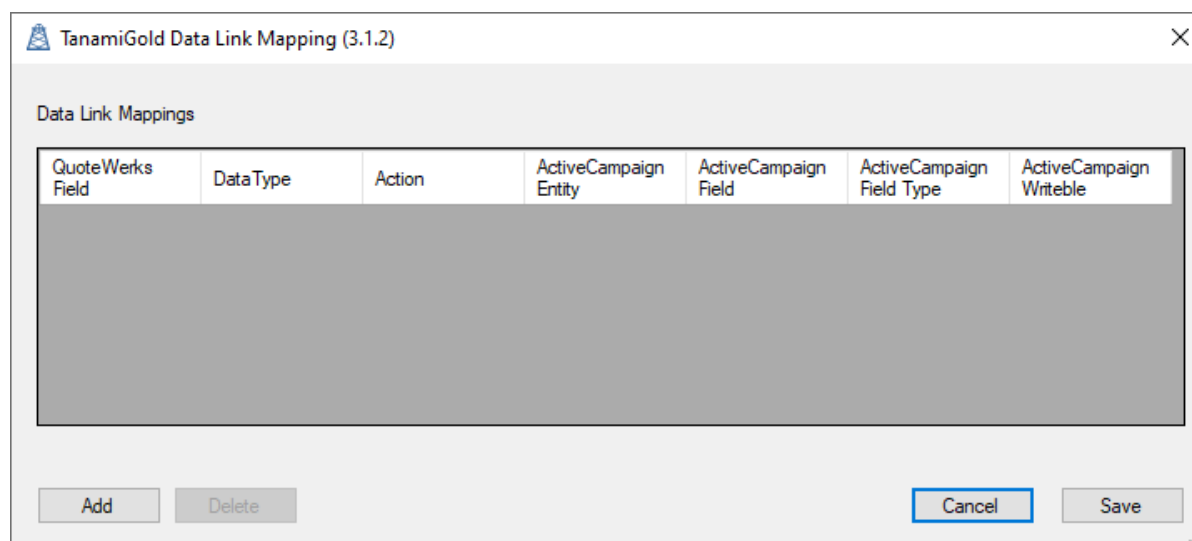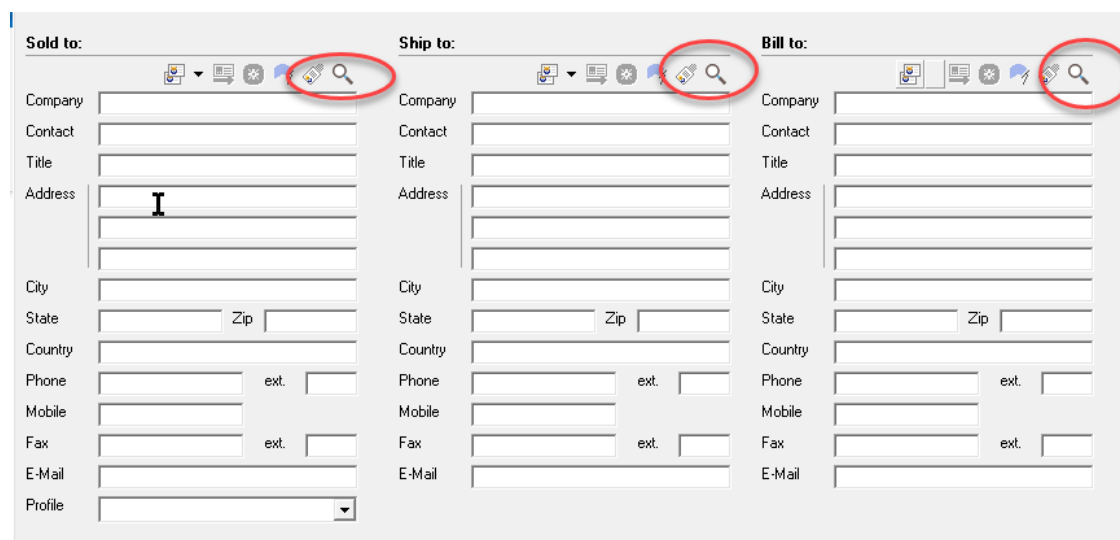You can customise the label for the button.

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.
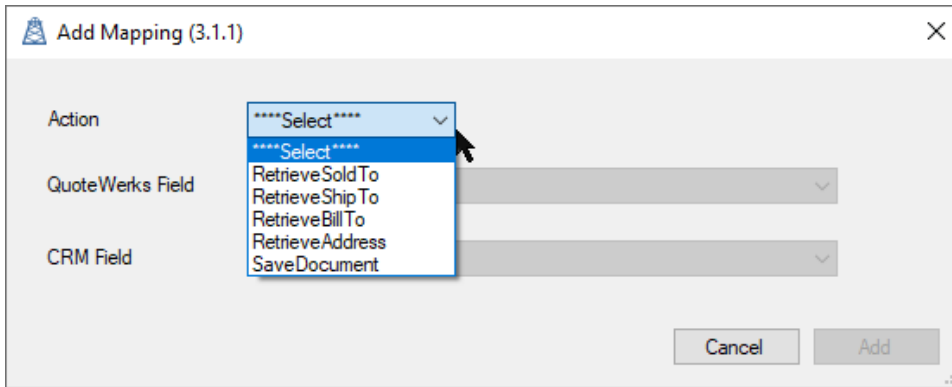

Fields mapped from ActiveCampaign to QuoteWerks the Contact Lookup button is pressed on the Sold To/Ship To tab from the Sold To, Ship To or Bill To address.

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.
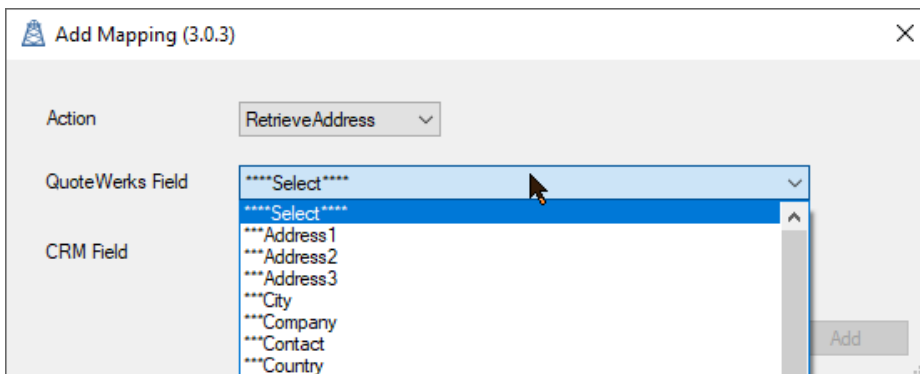
Add Mapping

To add a mapping, use the Add button (obvious I know).
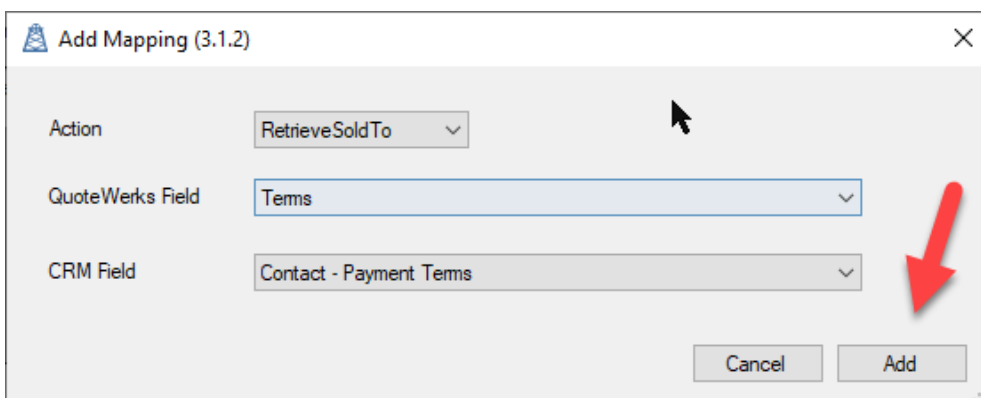
Select the action you want the mapping to operate on.

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.

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.
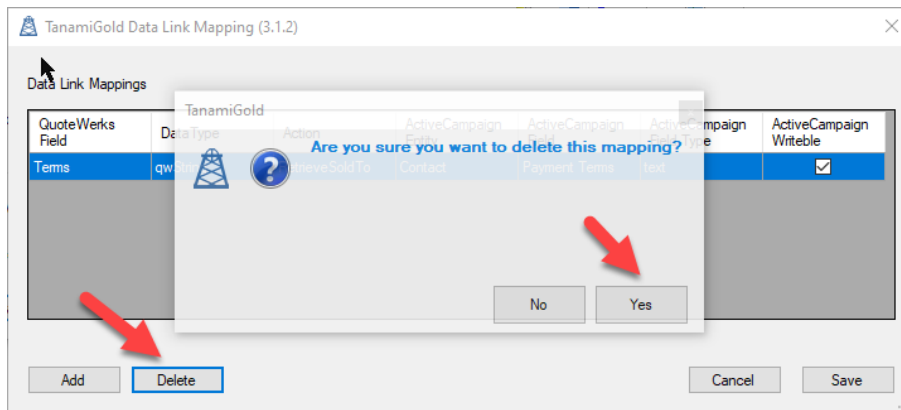
Once you have made your selection, click Add.

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
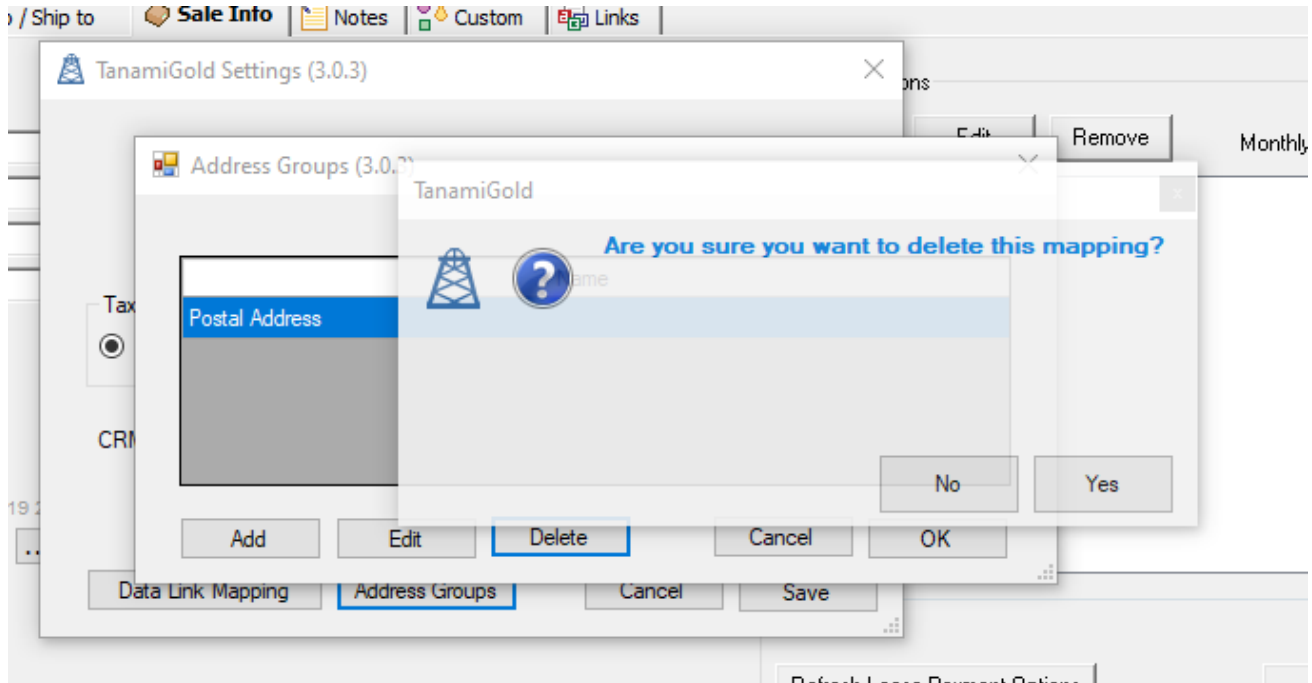

You don't have to map every field. The fields will map the corresponding field in the QuoteWerks Address.

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.
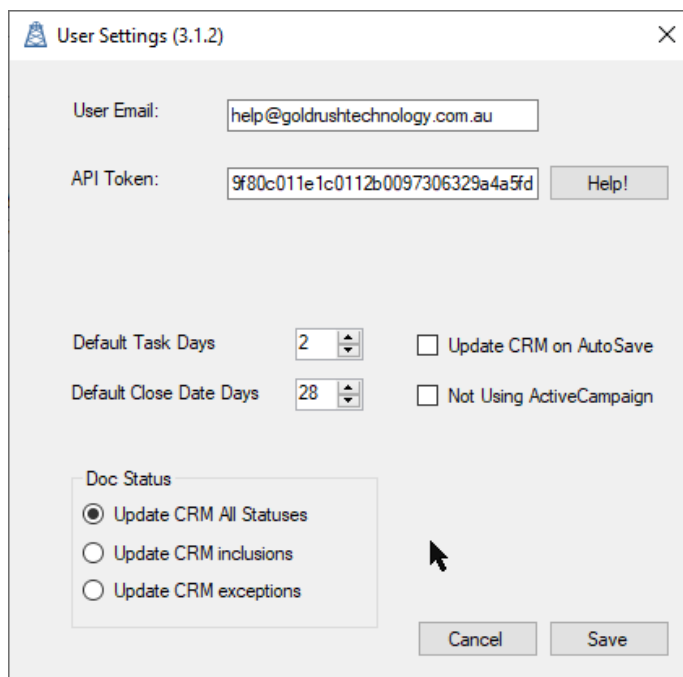
Delete Address Group

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

Menu Option – User Settings

The User Settings apply to each QuoteWerks user.

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.
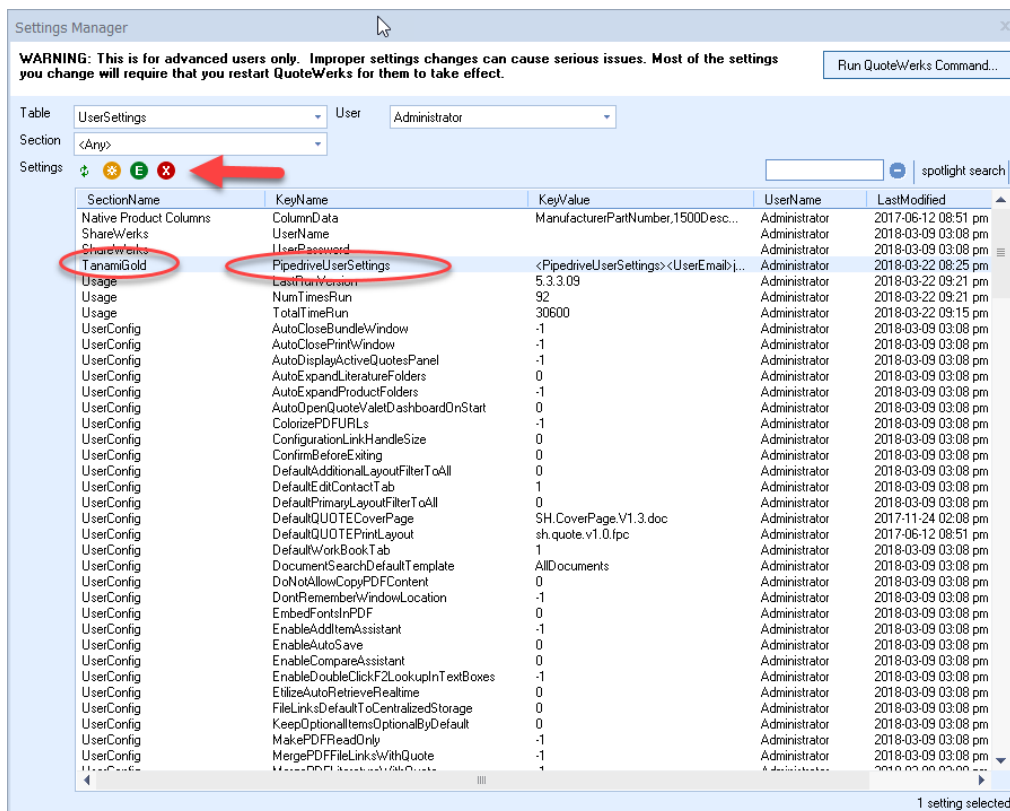
Not Using ActiveCampaign

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.

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.
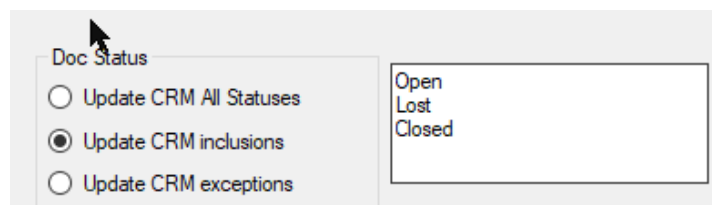
Update CRM inclusions

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.

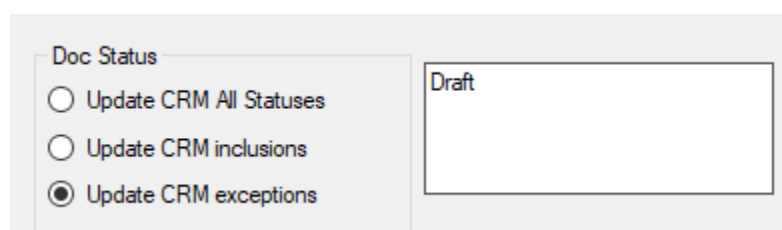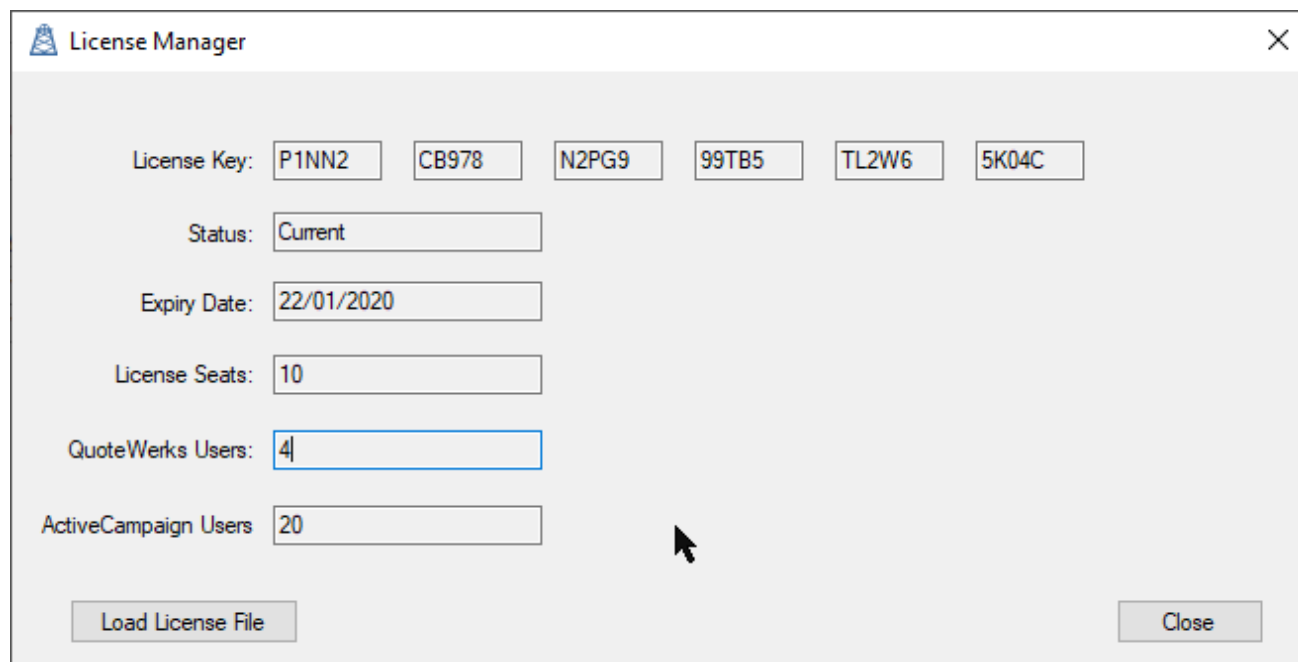In following example, it will only happen if the status is Open, Lost or Closed.

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.

Menu Option – License Manager

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

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.

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

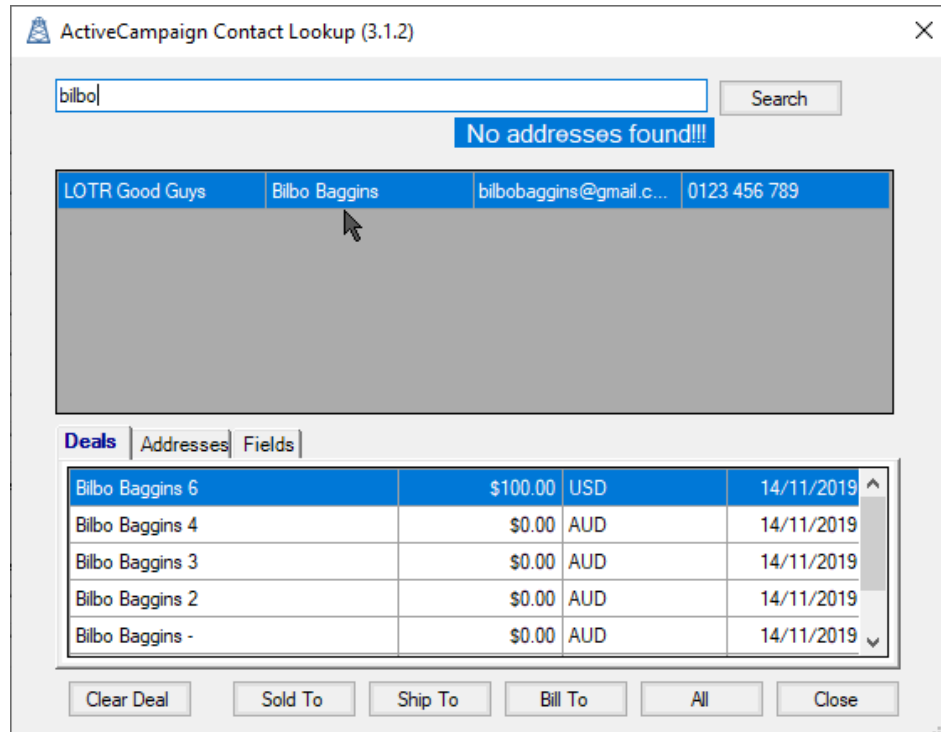Or you can use the Lookup Contact menu option in the Contacts Menu

ActiveCampaign Contact Lookup

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>.

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.

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

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.

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:
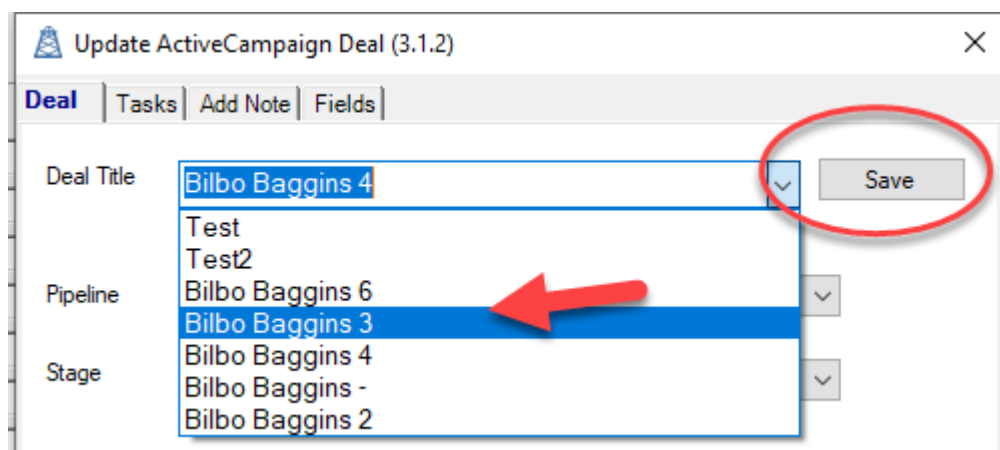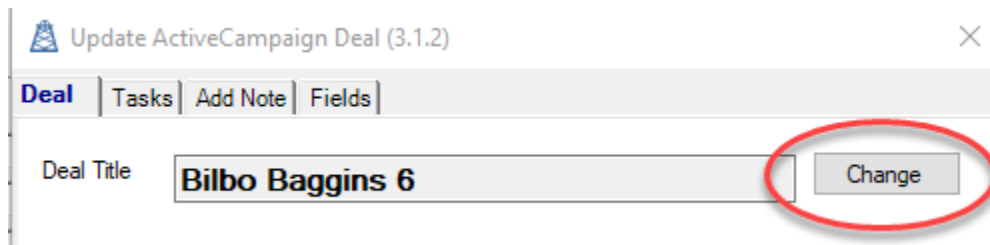
Updating the Deal
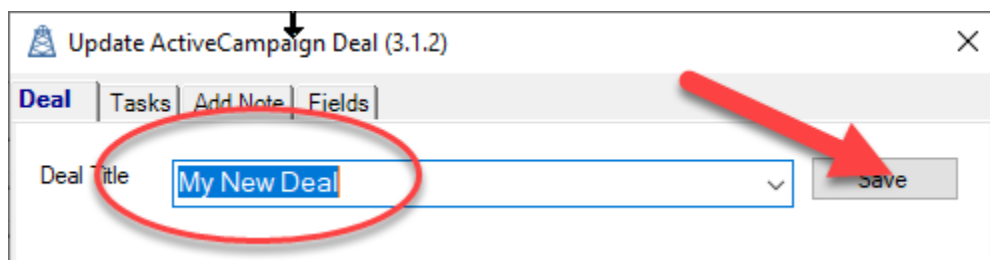
Deal Tab

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".

You can then change any other of the deal values, before clicking on "Update"
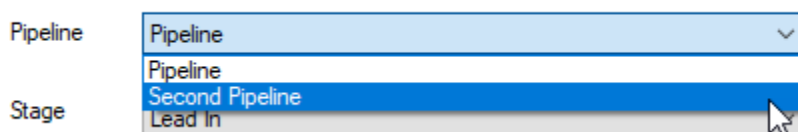
To create a new deal, after clicking on "Change", just type in the new deal name, then save:

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.

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.

Deal Value(GBP)   ☐ CAD   Quote Total

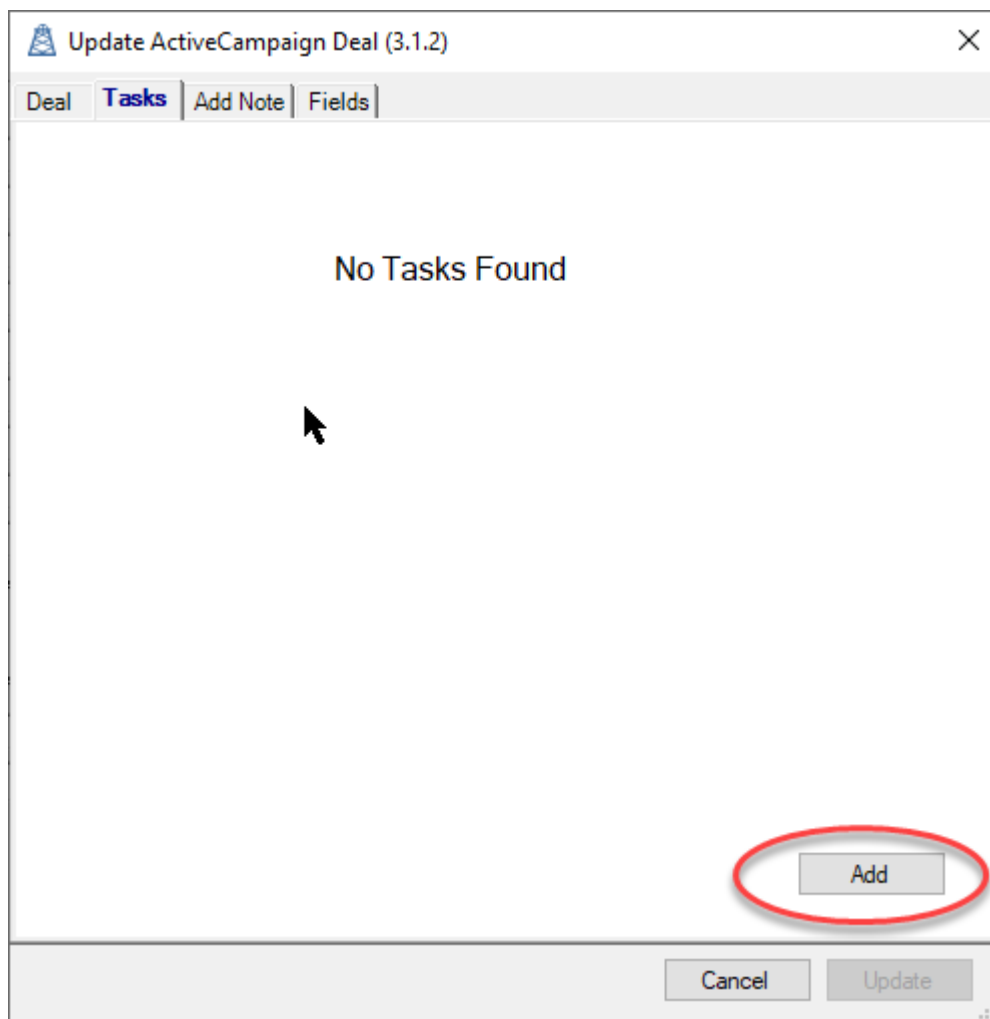$156,719.45   <---- $585.00

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.

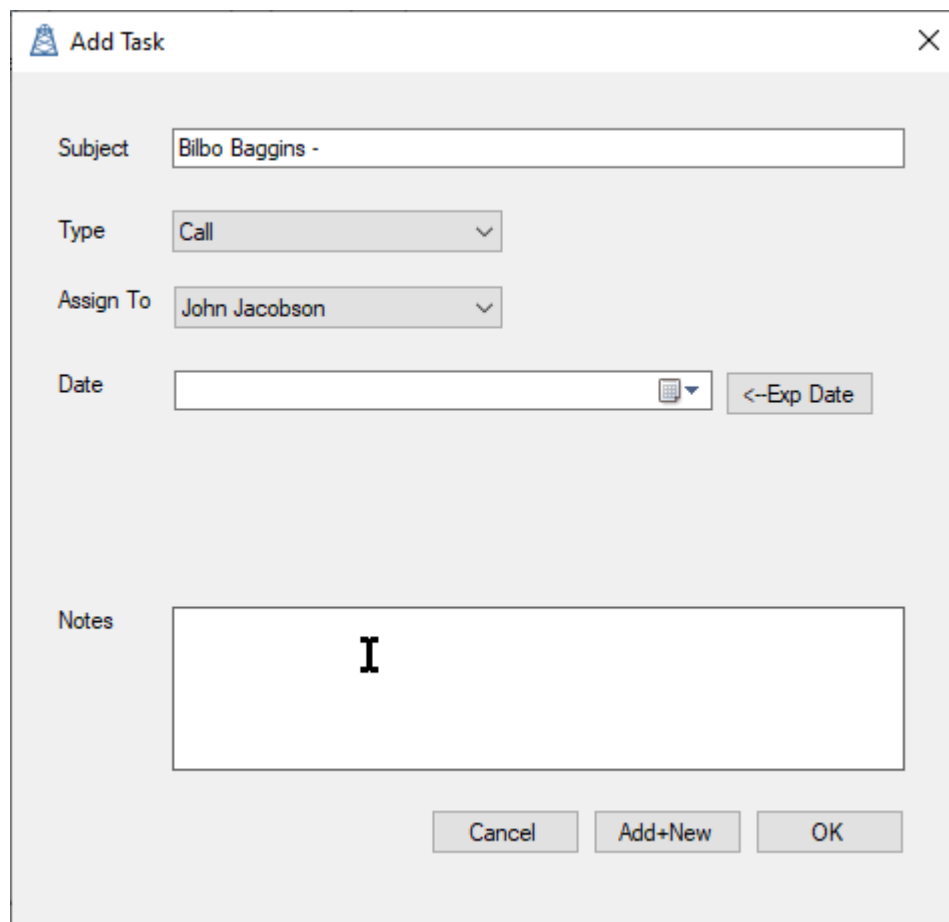Deal Status

⦿ Open   ◯ Won   ◯ Lost

Tasks Tab

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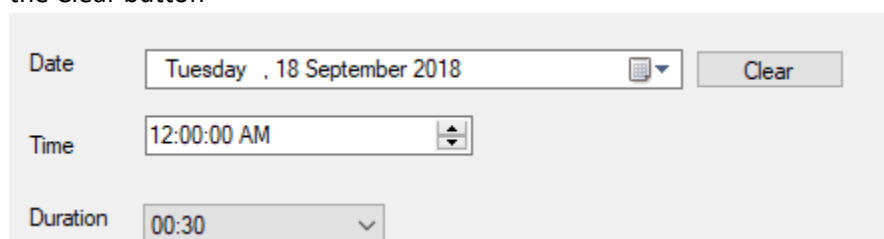
Add a task

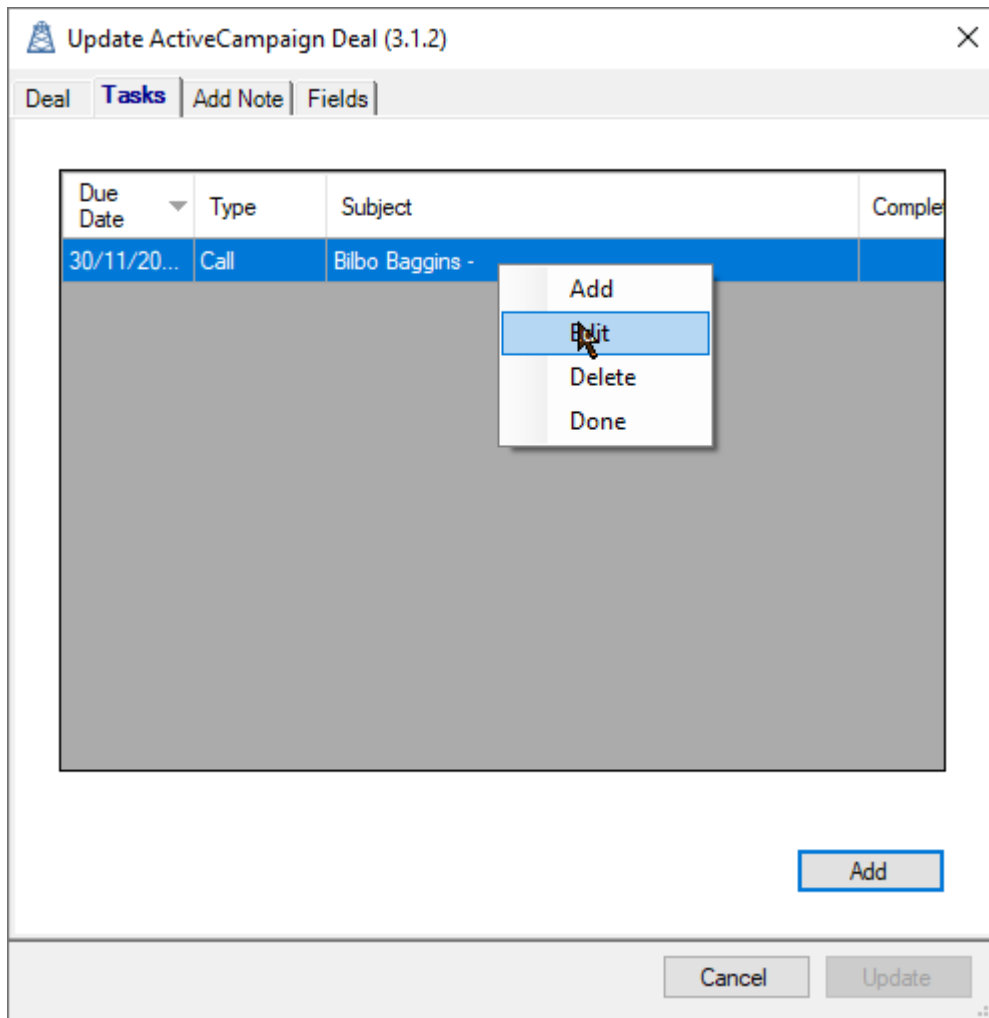When you click add, you can create a new task in ActiveCampaign, linked to the deal.

- 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

- 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.

Edit a task

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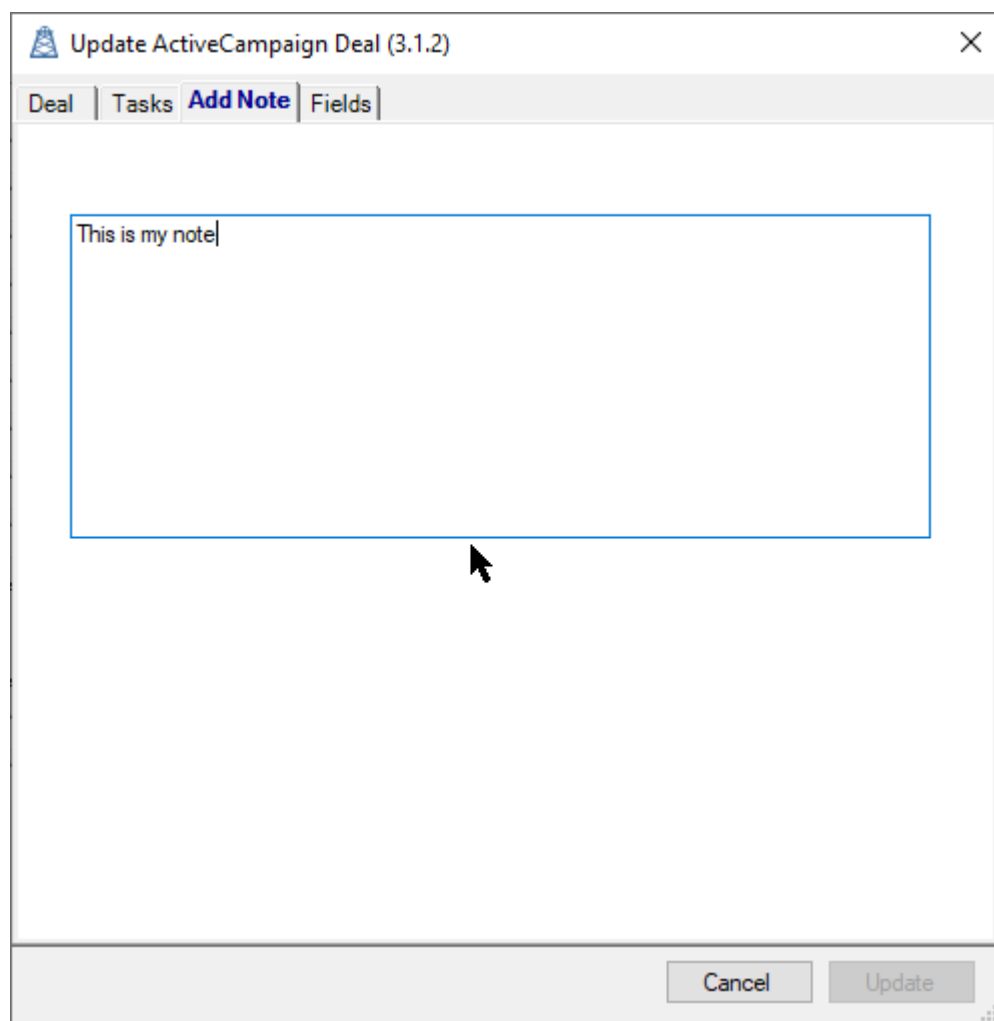
Delete a task

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.
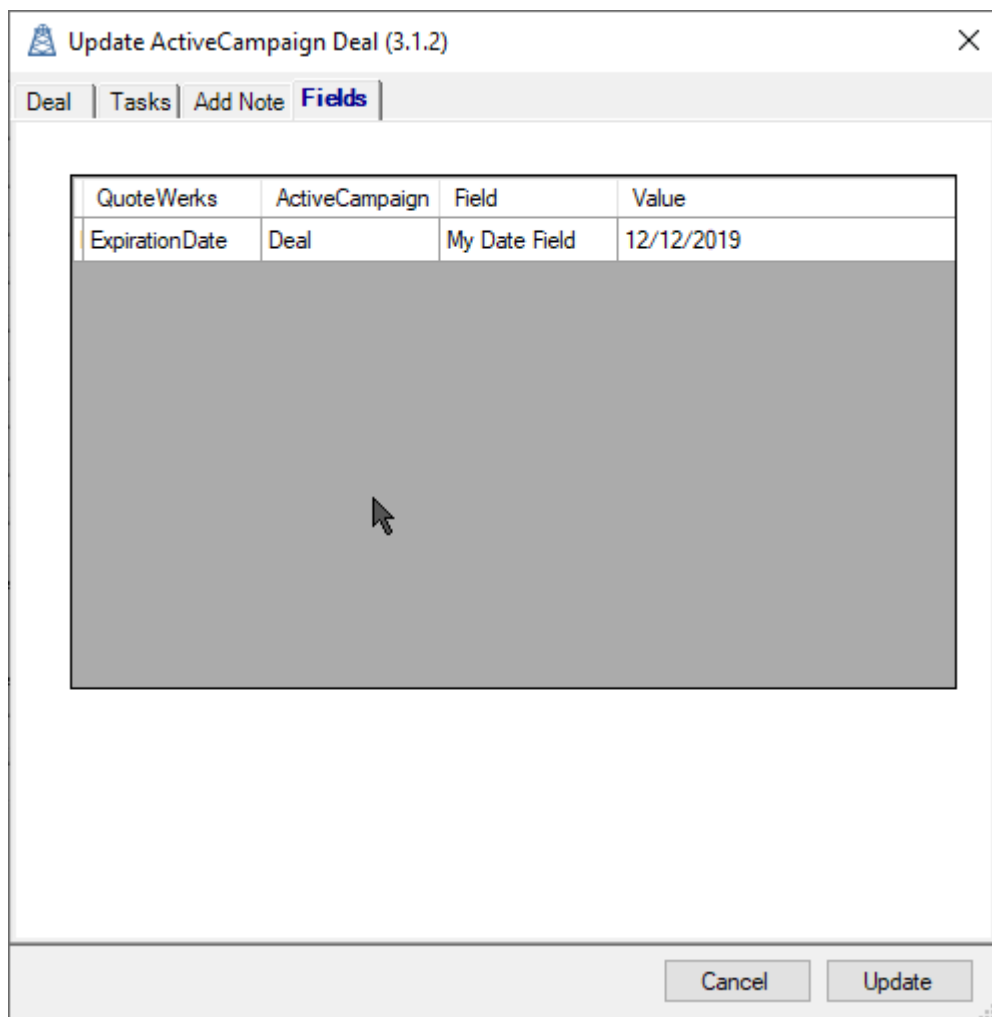

The note will be added when you click the "Update" button to update the deal.

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.

Support

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

Or visit our website at www.goldrushtechnology.com.au