User Manual
Version 3.1
for Pipedrive

www.goldrushtechnology.com.au

Contents

Overview

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

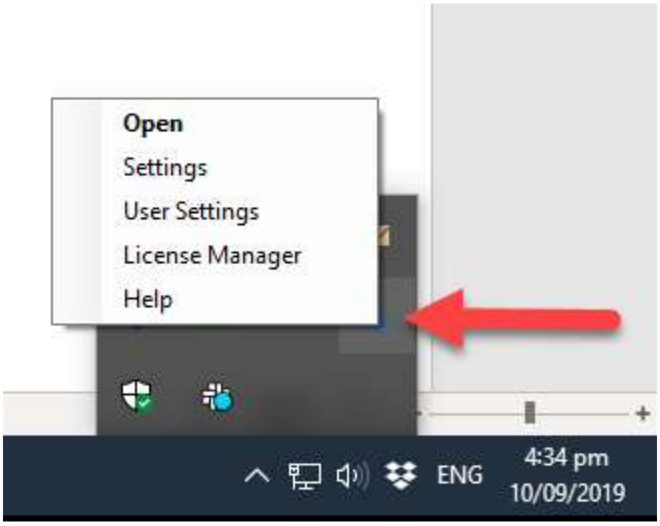
There are four basic times that TanamiGold passes data between your CRM.

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

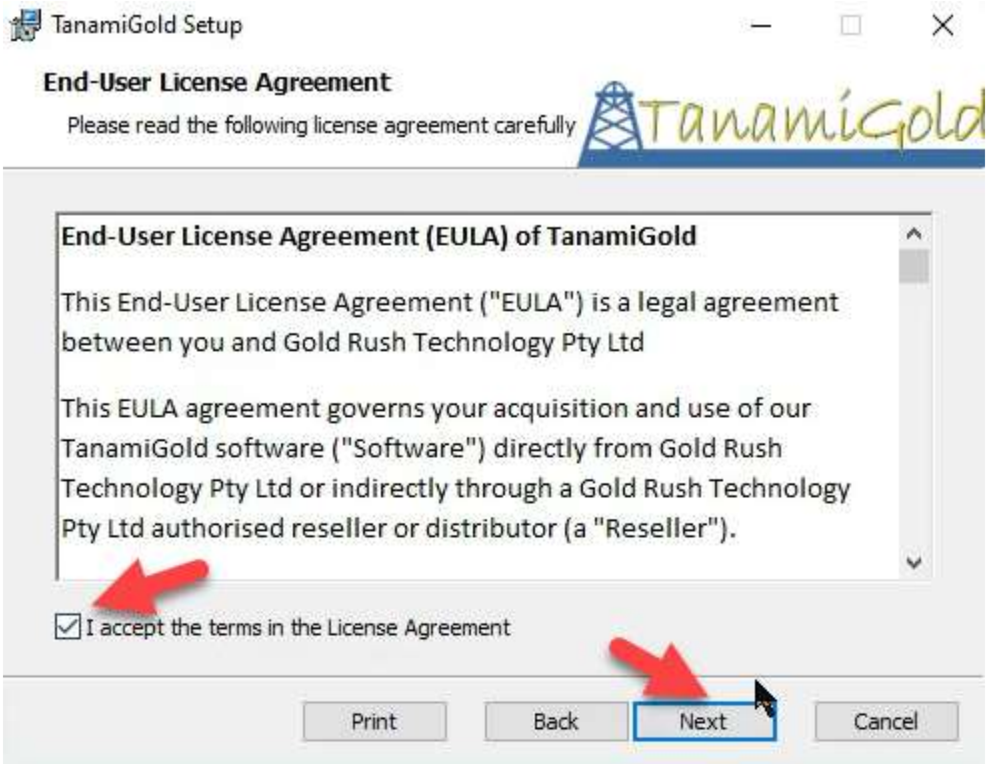


Installation

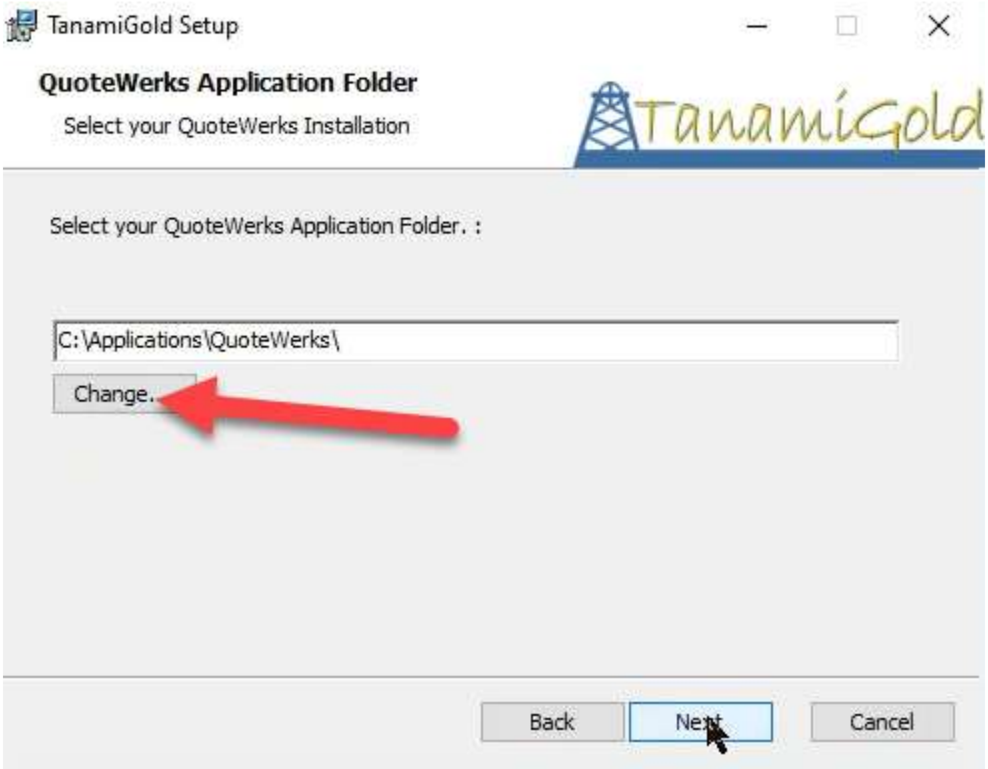
TanamiGold installs in the QuoteWerks Application Folder. So, like QuoteWerks, you run the installer and point it to QuoteWerks Application Folder, from one workstation. Then you run NoteSetup.exe from each workstation. The NodeSetup.exe is only required when you first install. It’s not required for 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

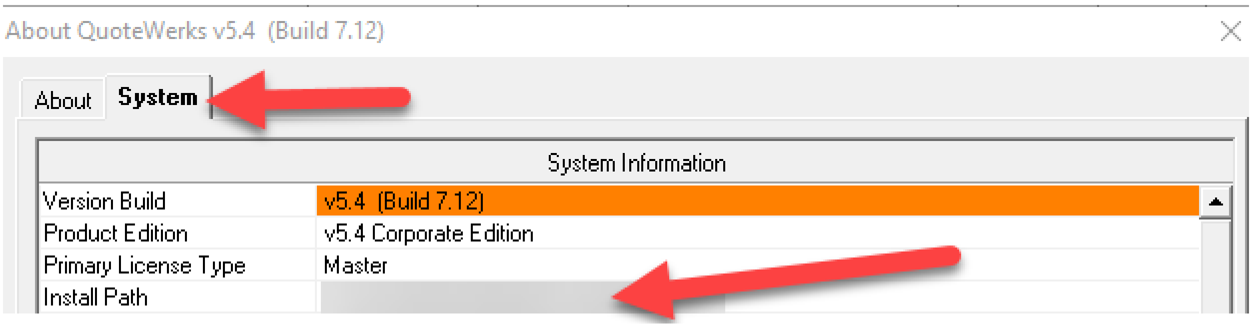
Accept the End User License Agreement



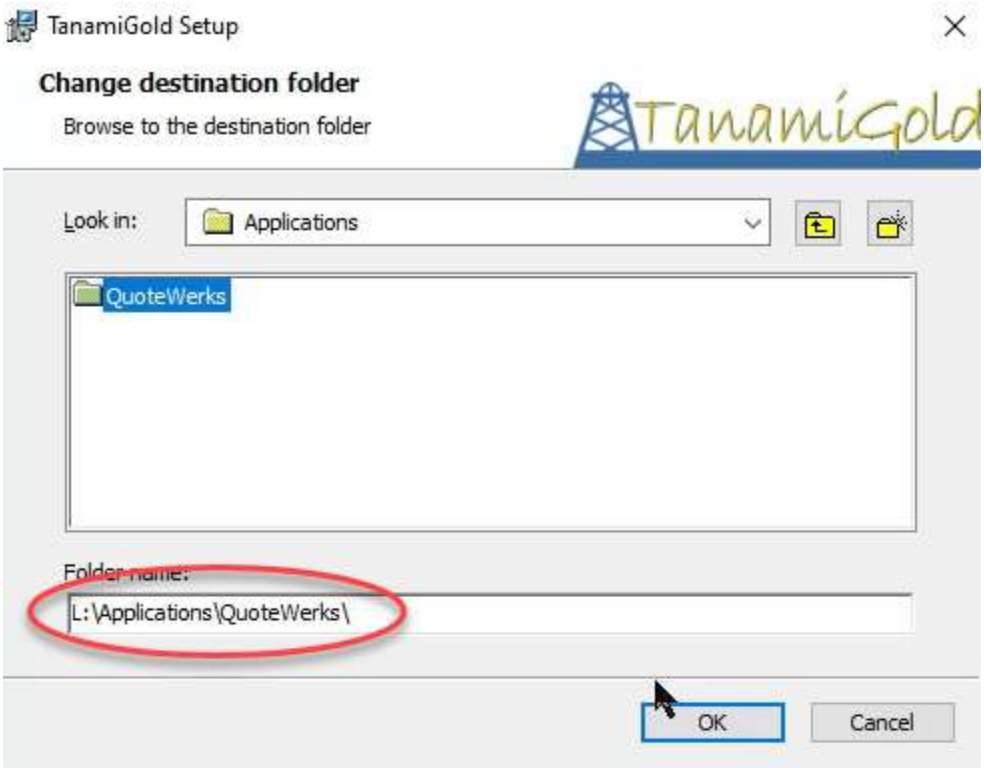
You install TanamiGold within your QuoteWerks Application folder. The installer will find the folder location for the last QuoteWerks install. If you need to change this, use the change button. You would only need to do this if you have more that one installation of QuoteWerks on your computer.



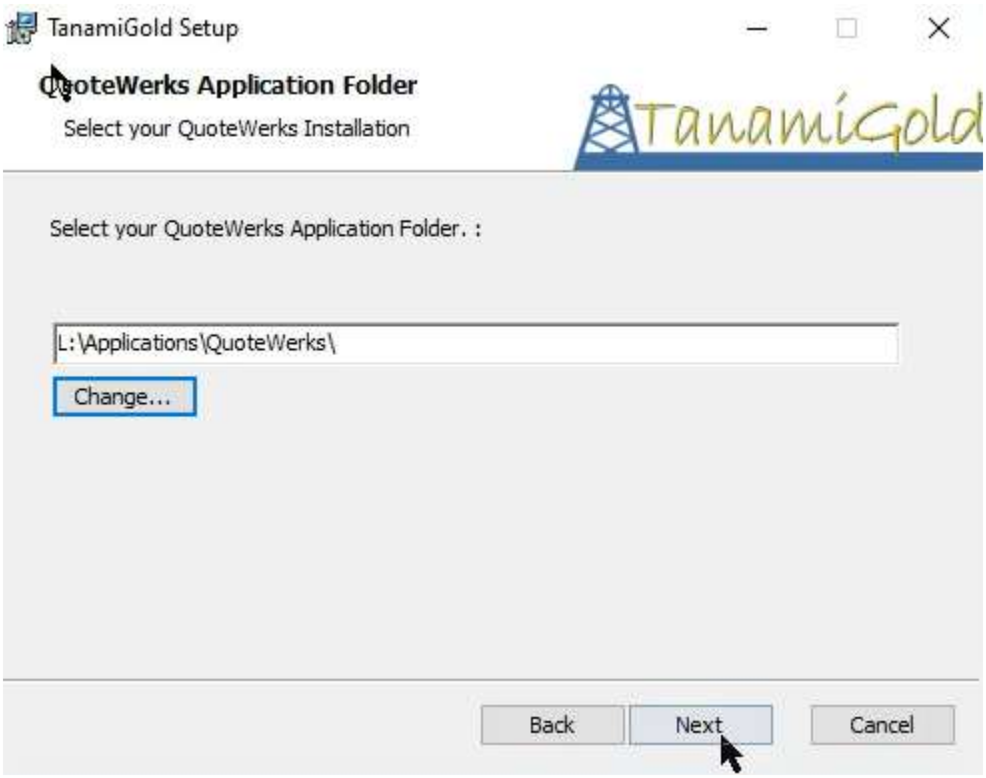
If you need to, change to your QuoteWerks Application folder. If you aren't sure what this folder is, in QuoteWerks, go to Help, About, Then Select the System Tab.



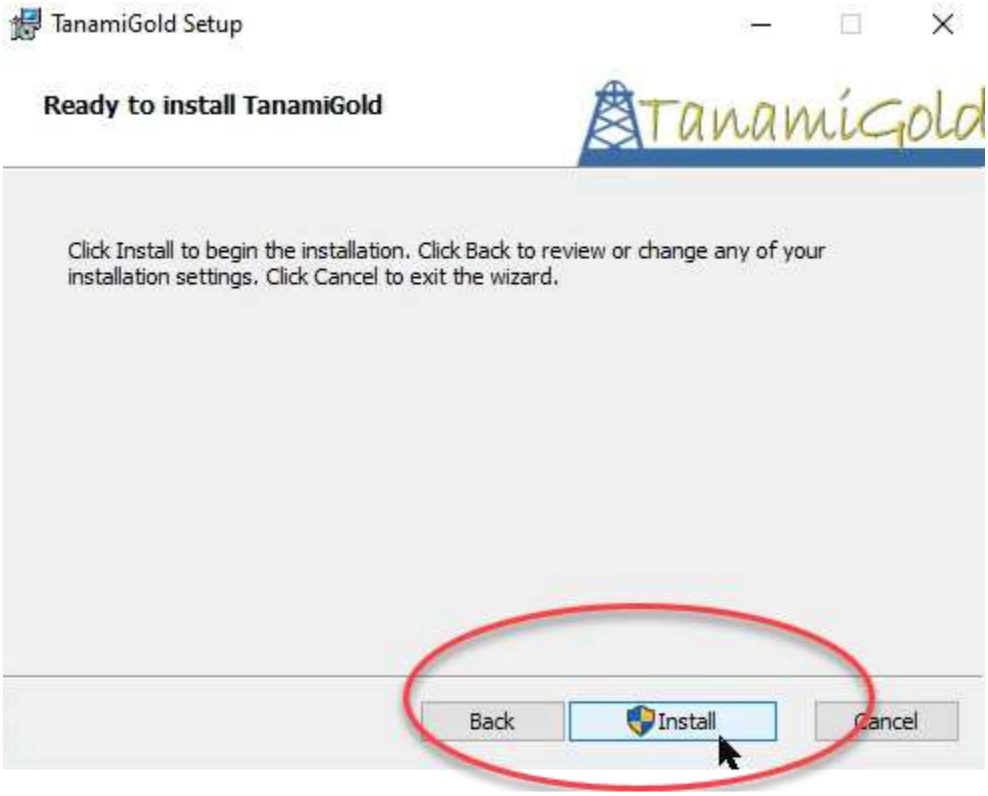
Navigate to your current QuoteWerks Installation, usually on your Network Server (but not always)

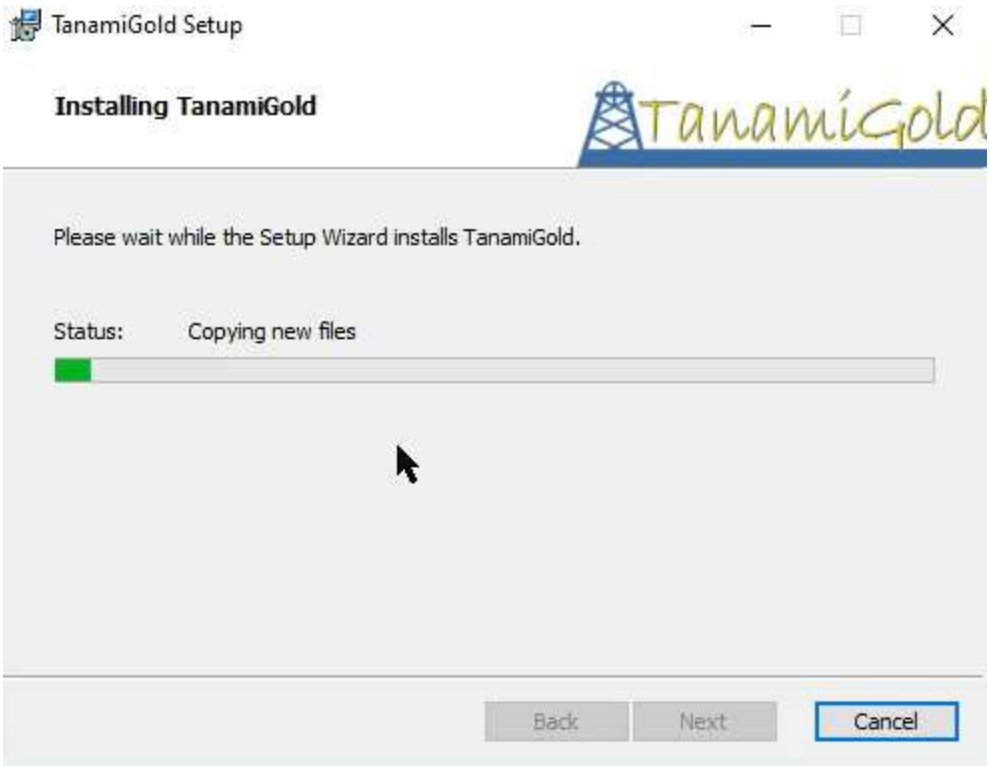


Then Click Next…

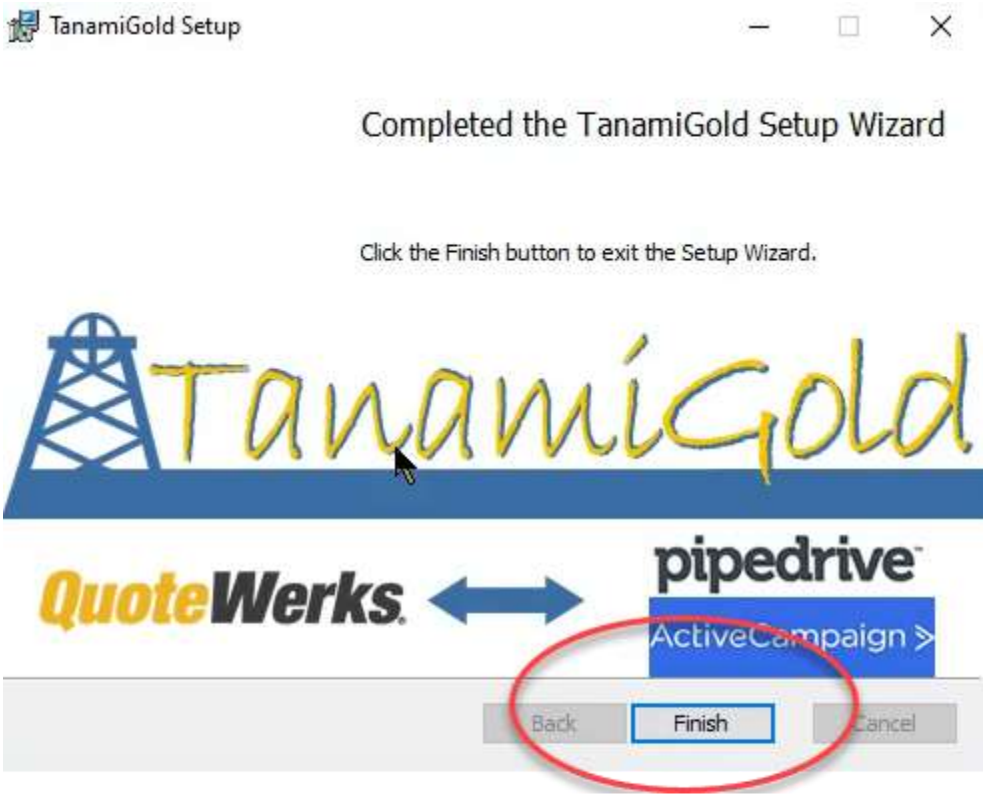


You are ready to go…



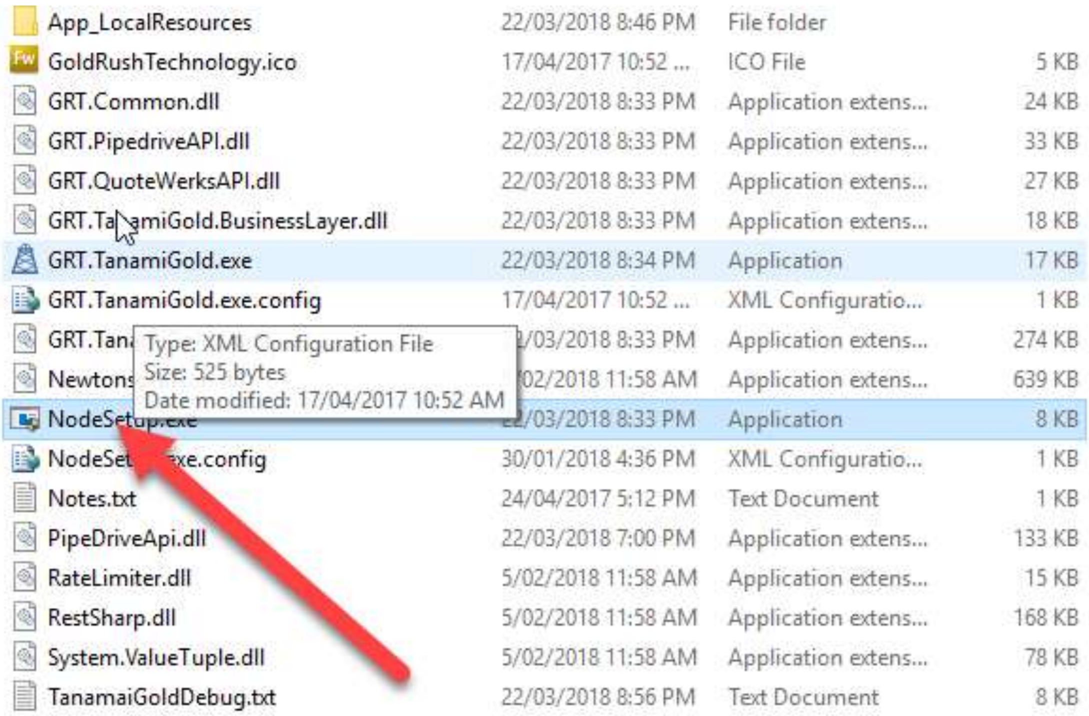


All done…


TanamiGold Setup
Completed the TanamiGold Setup Wizard
Click the Finish button to exit the Setup Wizard.
TanamiGold
QuoteWerks
pipedrive
ActiveCampaign
Back
Finish
Cancel

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

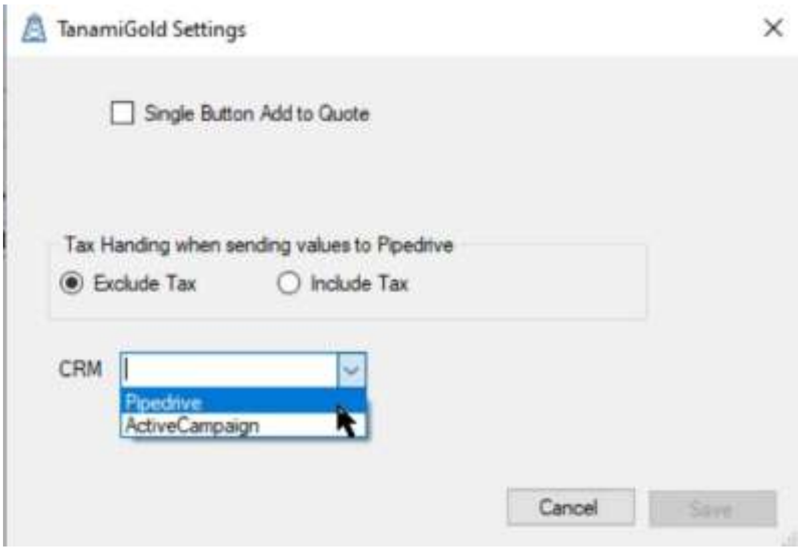
Run NodeSetup.exe from all other workstations

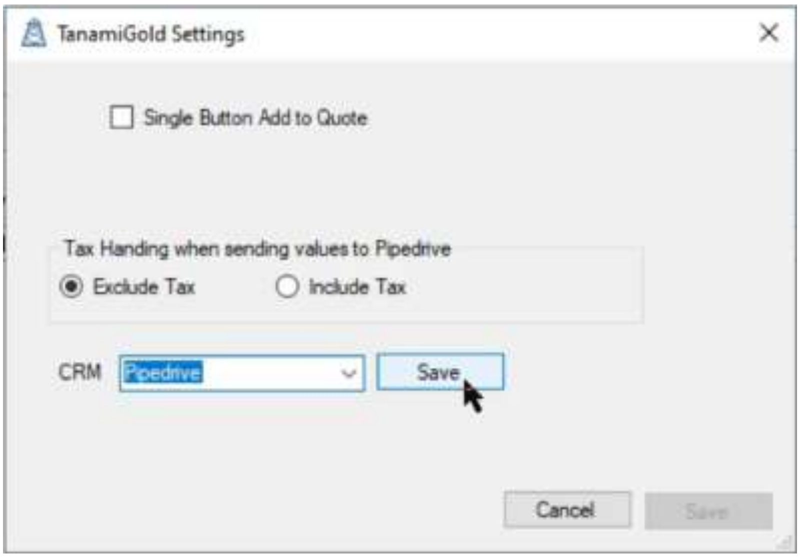


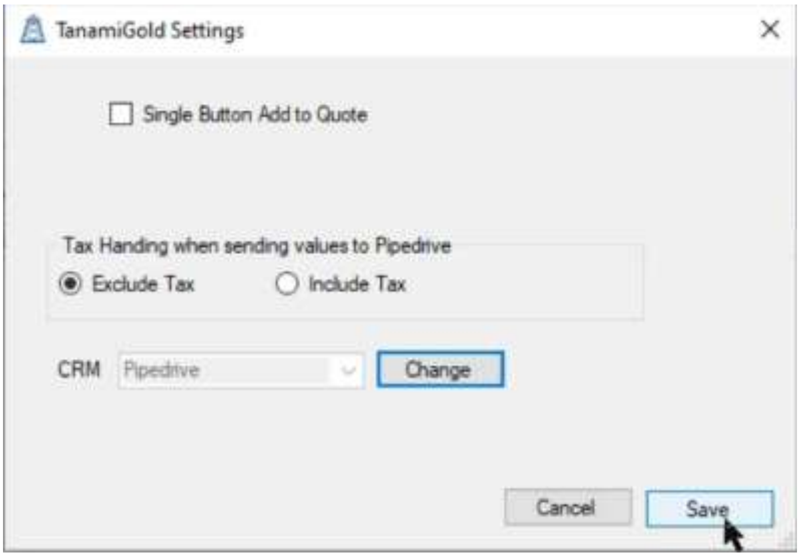
Initial Setup

Selecting Pipedrive 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 Pipedrive, and then save their selection.

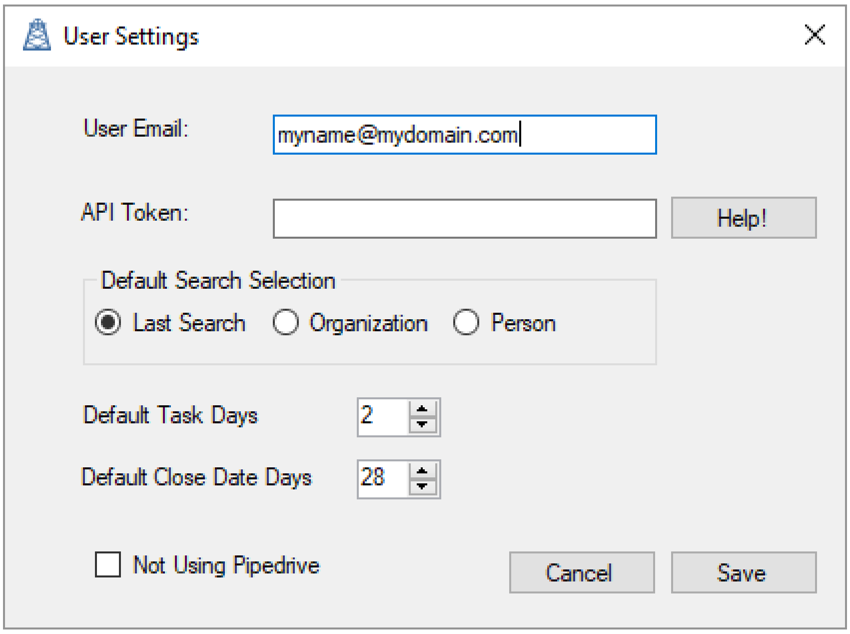






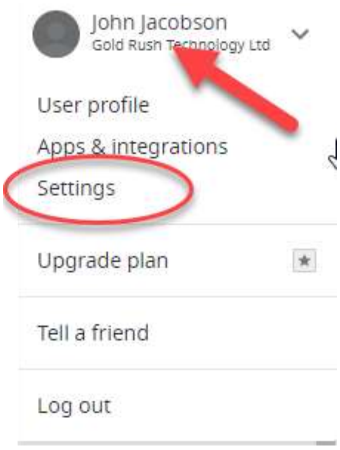
Entering your Pipedrive API Key

You will then be required to enter your Pipedrive 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:

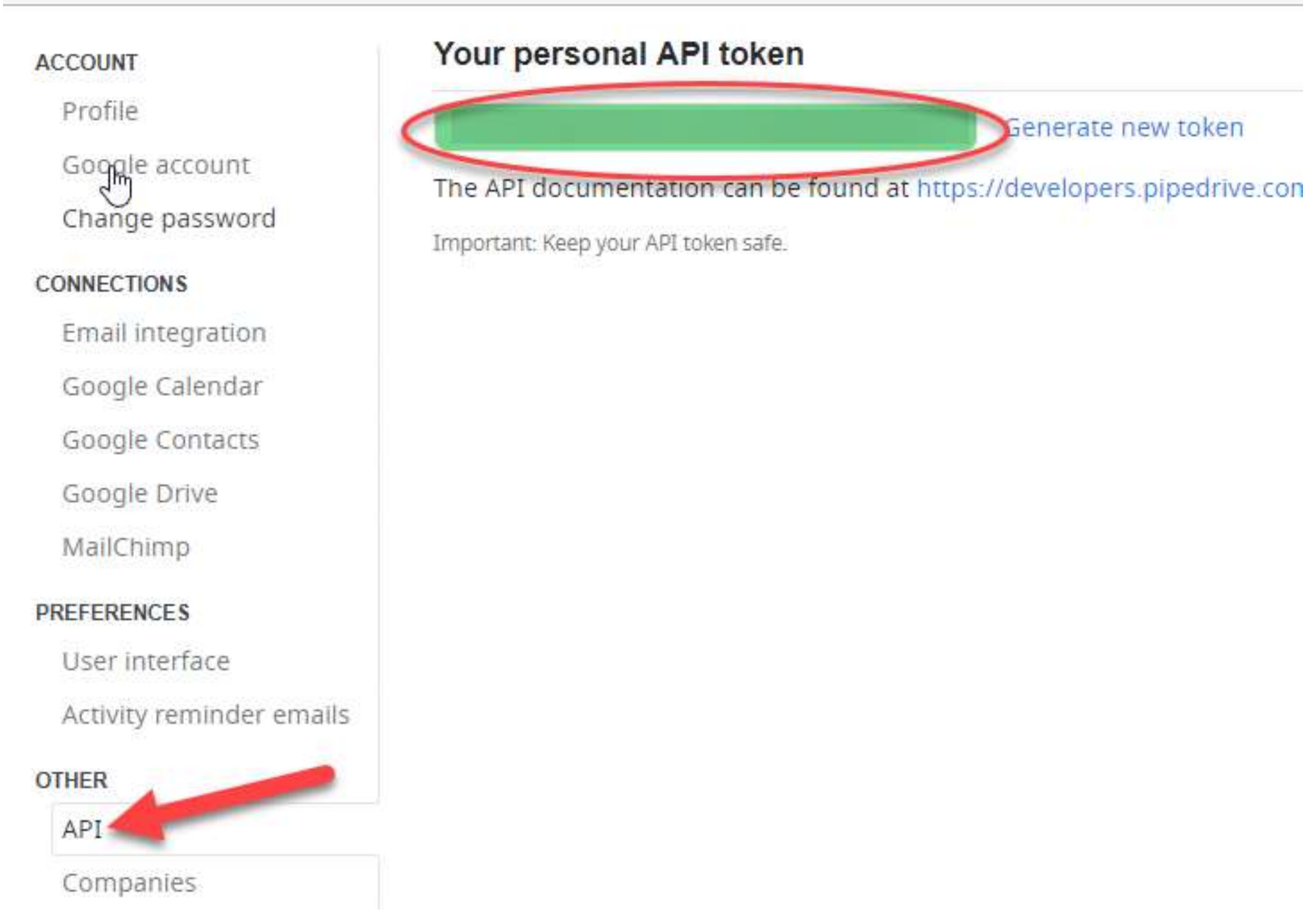


You need to enter your Pipedrive API key. To find out where to get this, if you click "Help!" you will see a short video that explains where to find this key.

Click on your name, then click Settings.

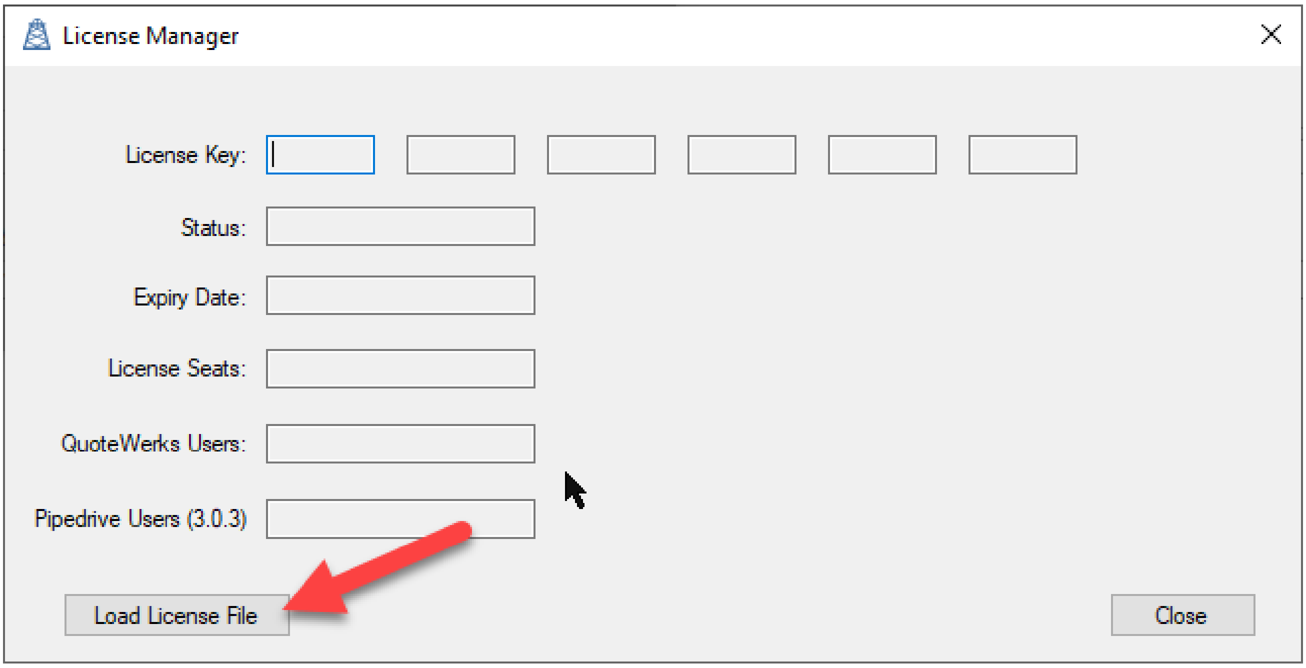


Then select API, and you can select your API key and copy and paste it into TanamiGold. You only have to do this once.

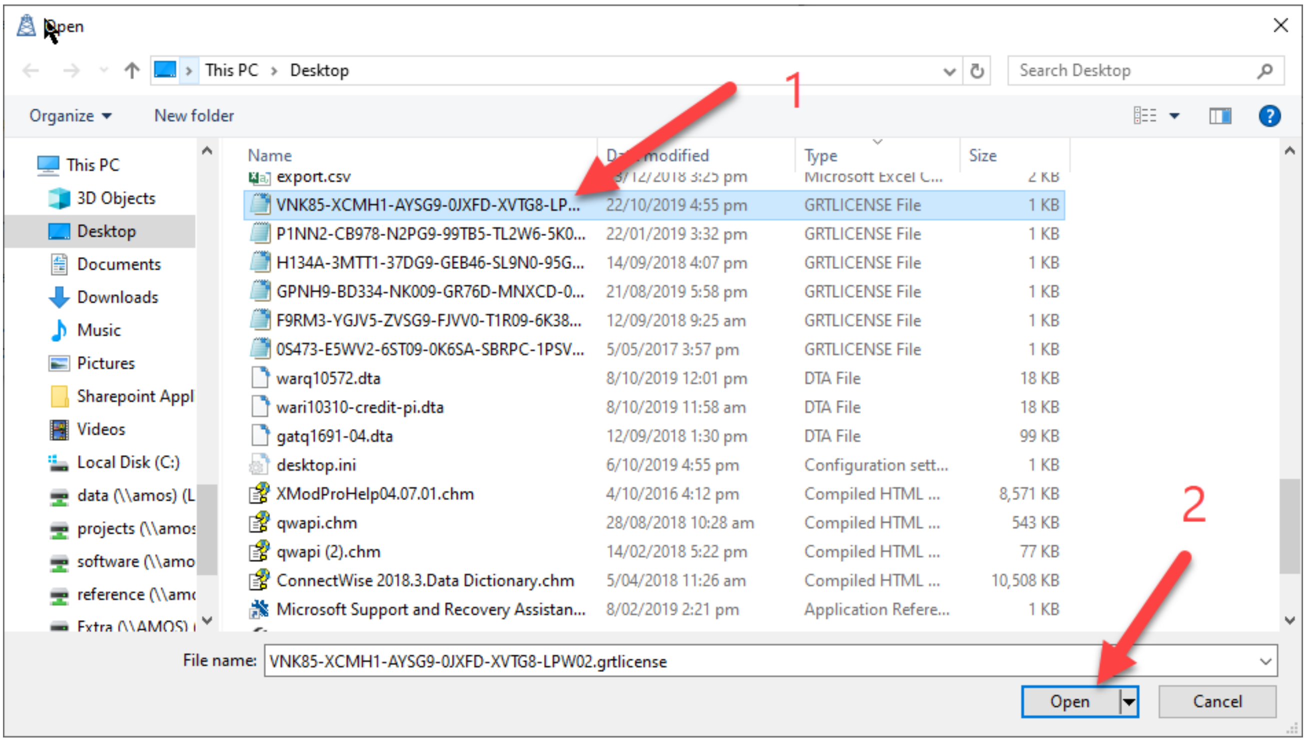


Loading your TanamiGold License File

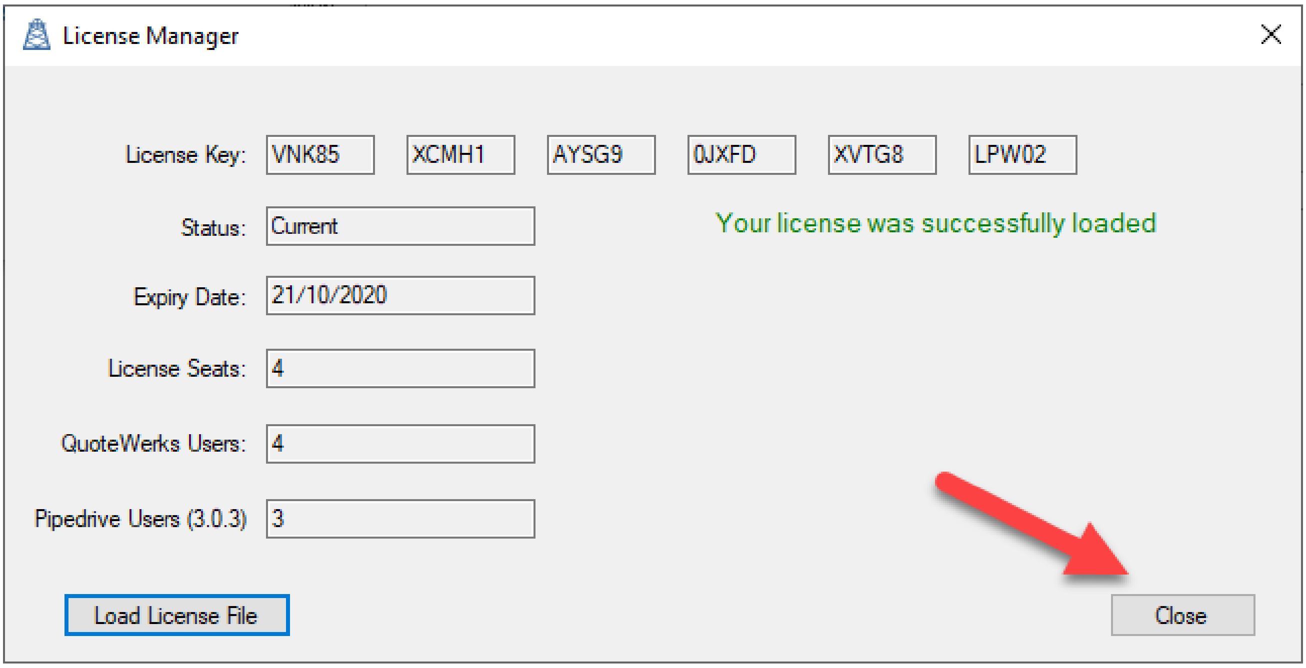
After adding your API key, the next window will be the license manager, where you load your license file. Even if you are trialling TanamiGold, you need a license file.



Select the license file from where you have saved it



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

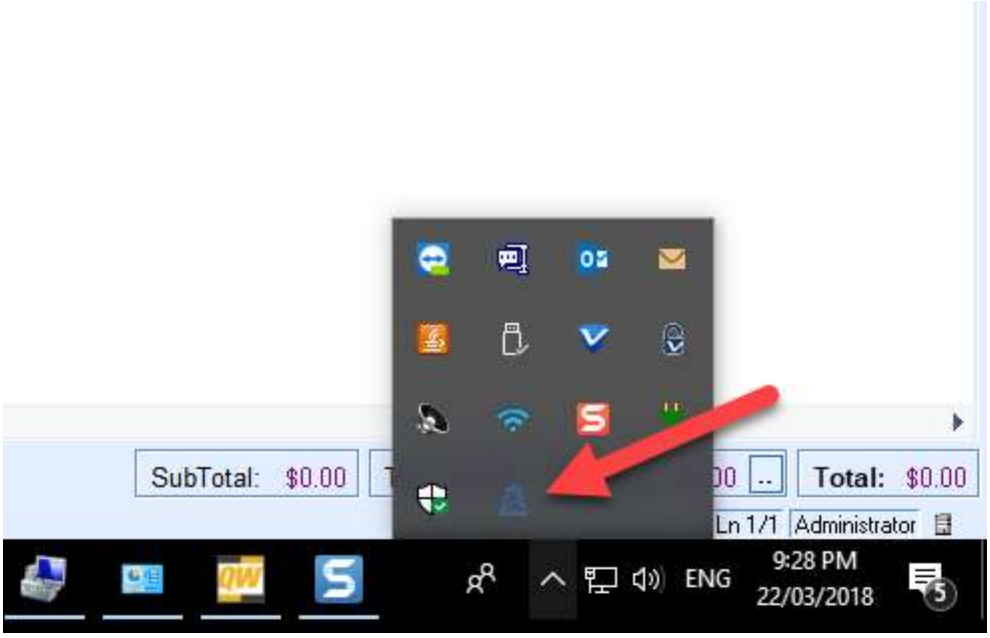


Remember, each user will have to load their own API key.

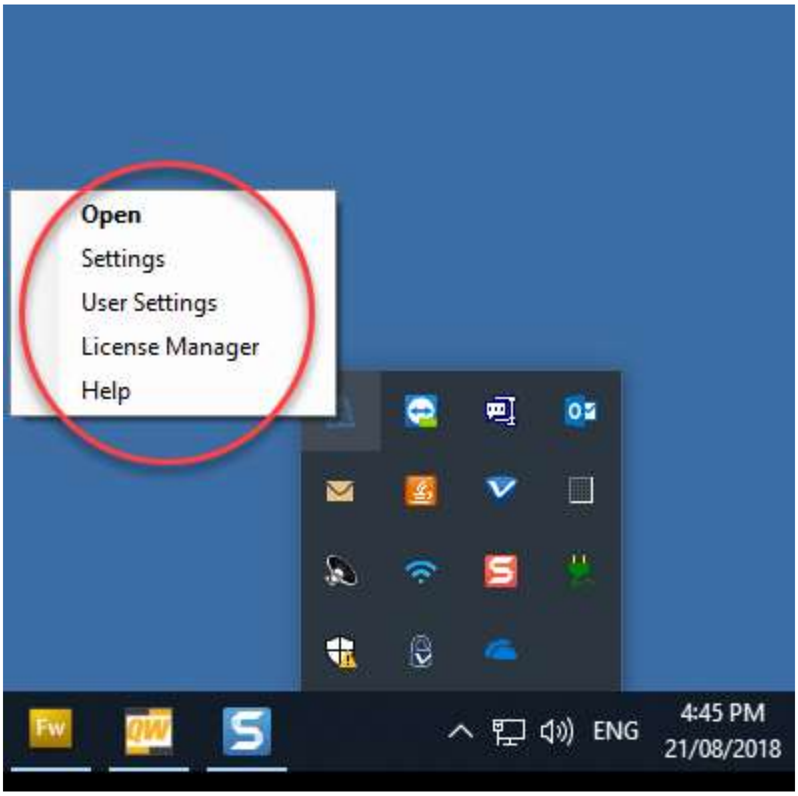
If you create a new user by cloning the user in the QuoteWerks User Maintenance screen, this will also clone the API key, so you will need to change this from the User Settings menu from the icon in the system tray. (See below)

Accessing the TanamiGold Settings

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

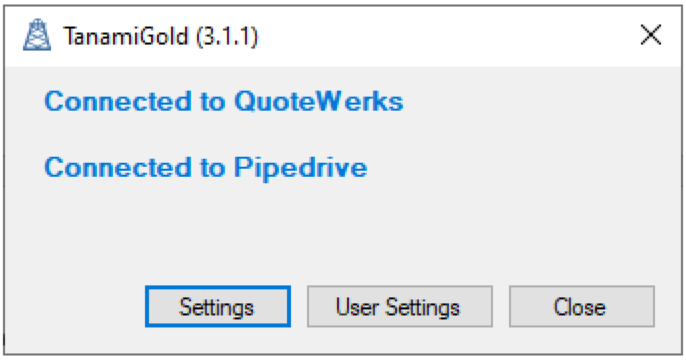


Right click the icon to see the menu.



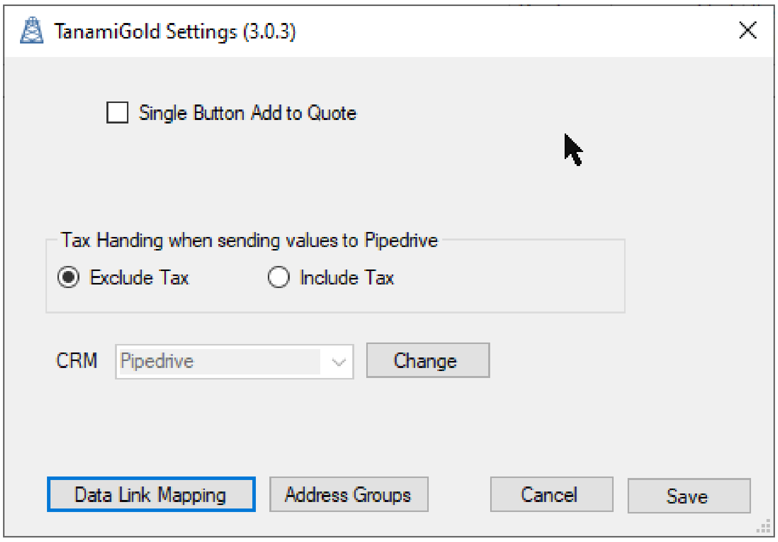
Menu Option – Open

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



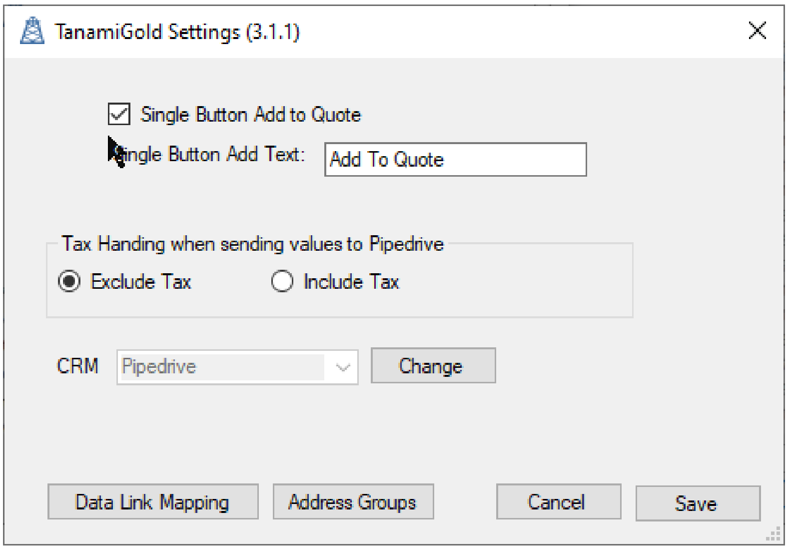
Menu Option – Settings

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 Pipedrive 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 Pipedrive fields to the Ship To and Bill To addresses.



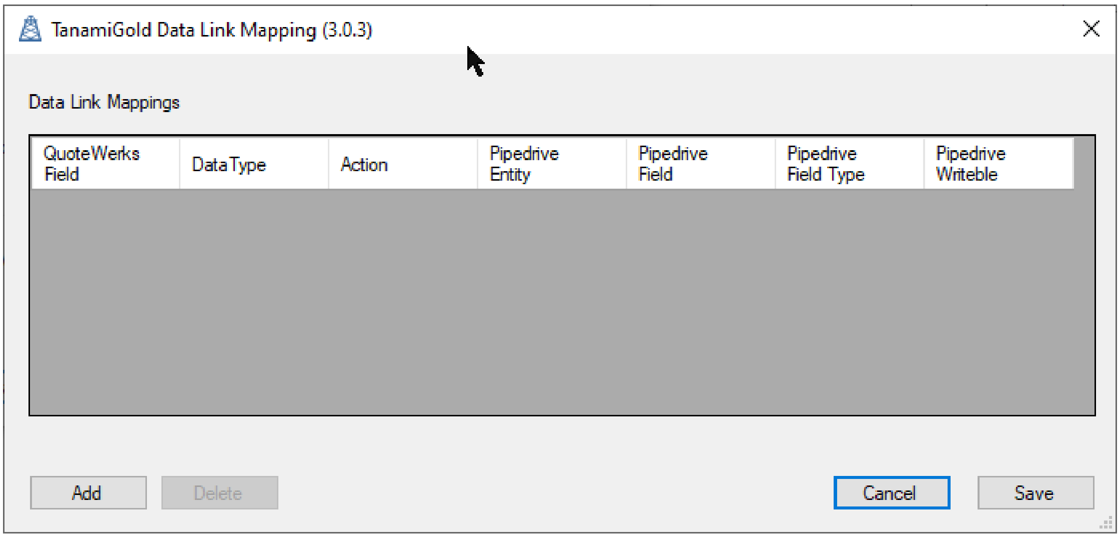
You can customise the label for the button.

Tax Handling

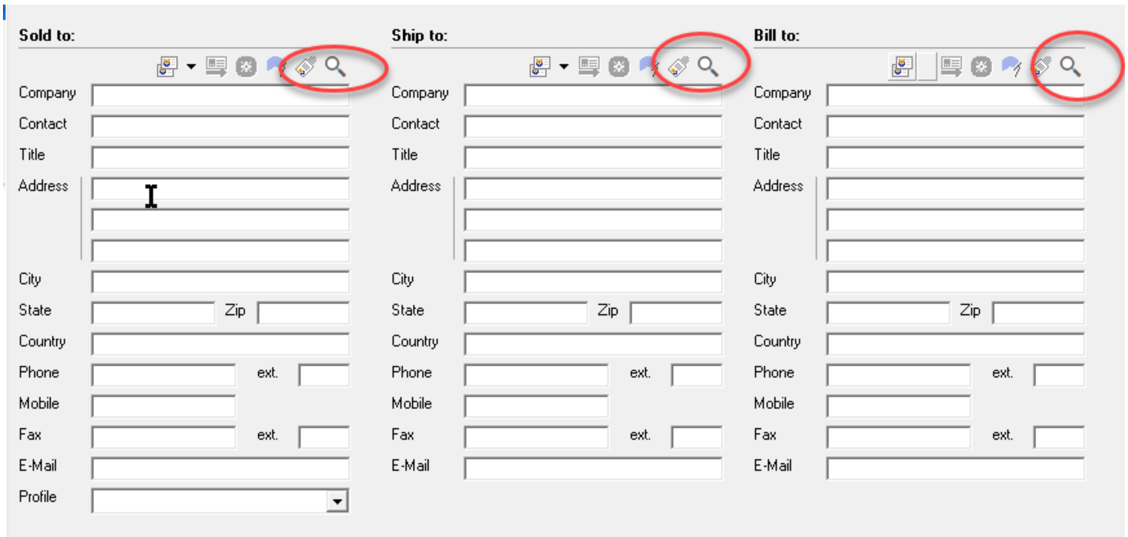
You can select whether the sales values sent to Pipedrive are exclusive or inclusive of tax.

Data Link Mapping

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

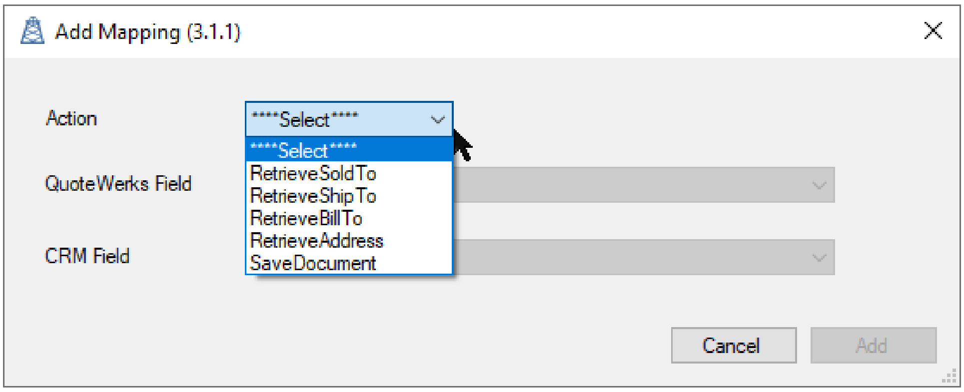


Fields mapped from Pipedrive to QuoteWerks the Contact Lookup button is pressed on the Sold To/Ship To tab from the Sold To, Ship To or Bill To address.



Fields are mapped from QuoteWerks to Pipedrive 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.

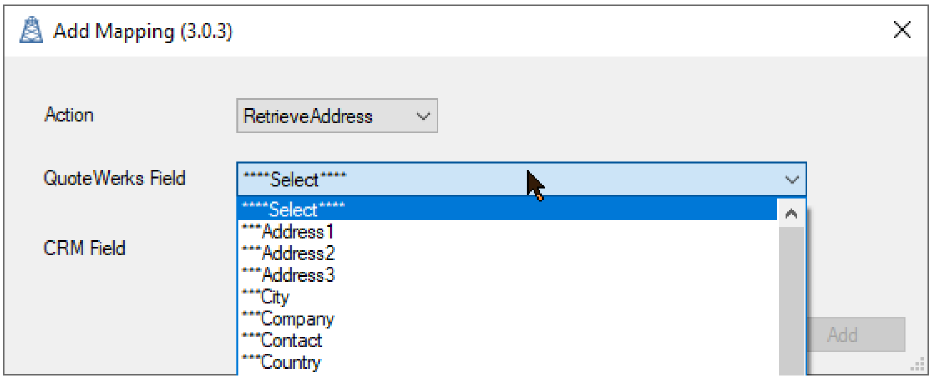


Add Mapping

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

Select the action you want the mapping to operate on.

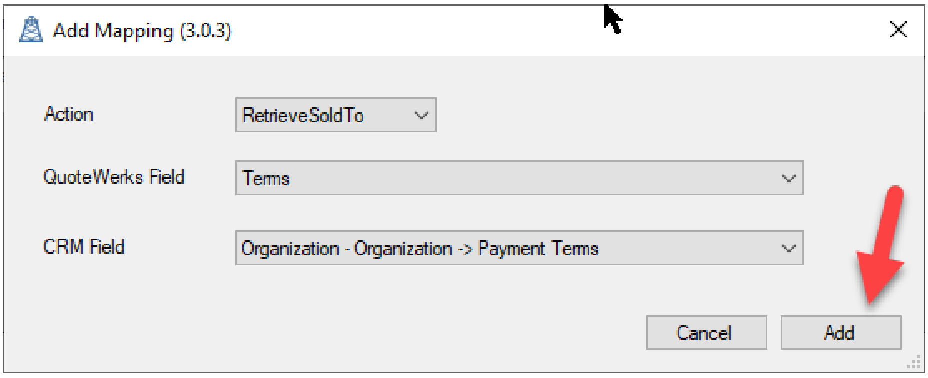
Select the QuoteWerks field you want. The fields that start with “***” are generic address fields, so you can map to the ShipToTitle field when the ShipTo lookup is clicked.



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

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

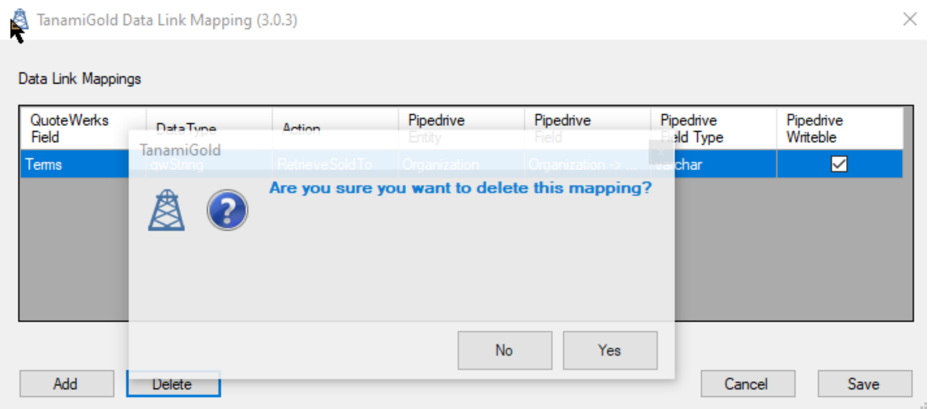
Once you have made your selection, click Add.



Delete Mapping

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

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

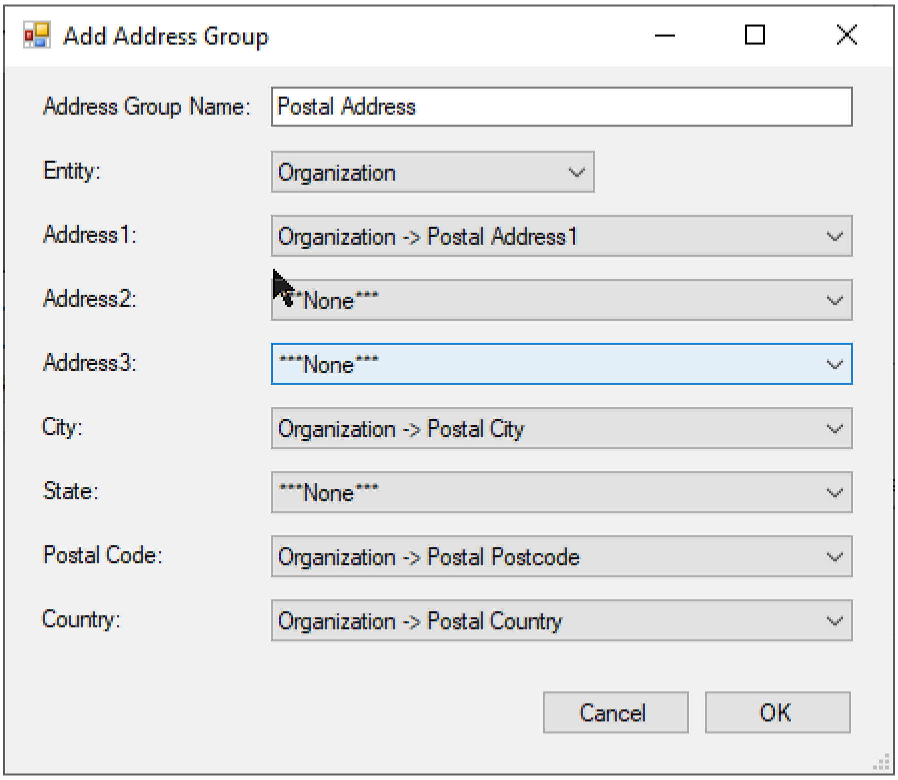


Editing a Mapping
To edit a mapping, simply delete it and add it again.

Note of Caution
You can select both Pipedrive 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 Pipedrive as a single address. The Pipedrive 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 Organization, Person or Deal, then select the fields that are related to the address, in this case, the Postal Address

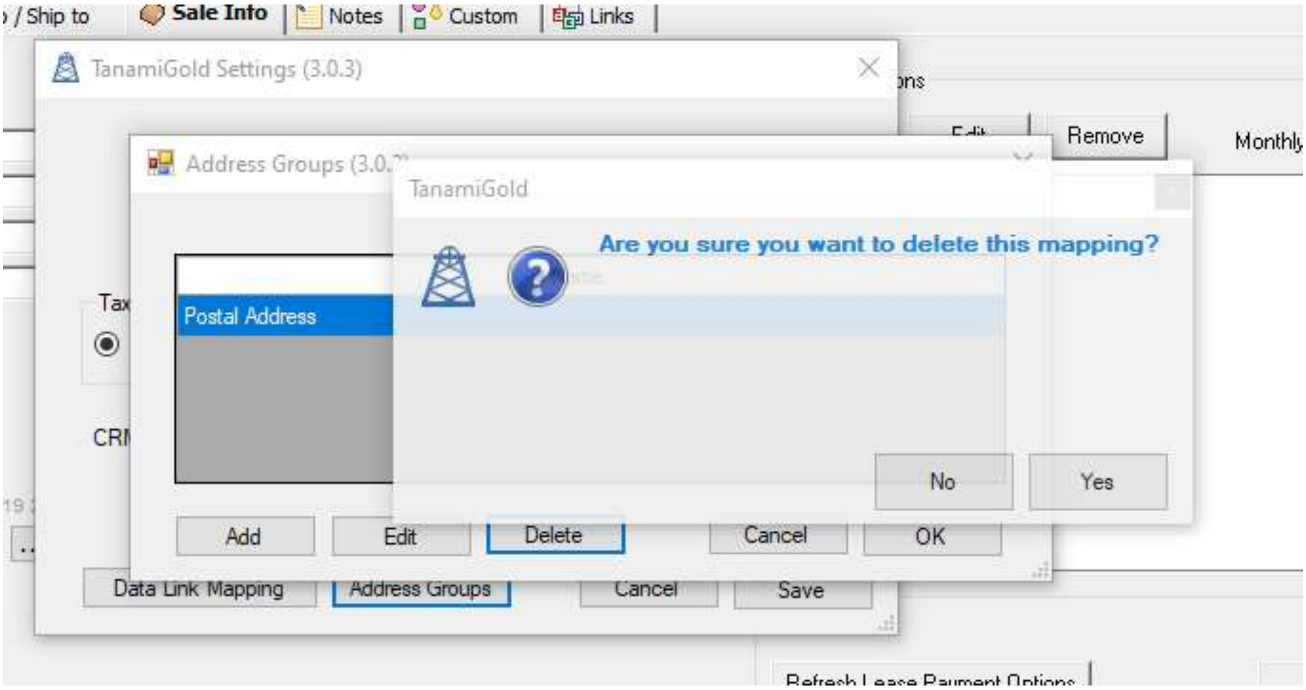


You don't have to map every field. The fields will map the corresponding field in the QuoteWerks Address.

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.

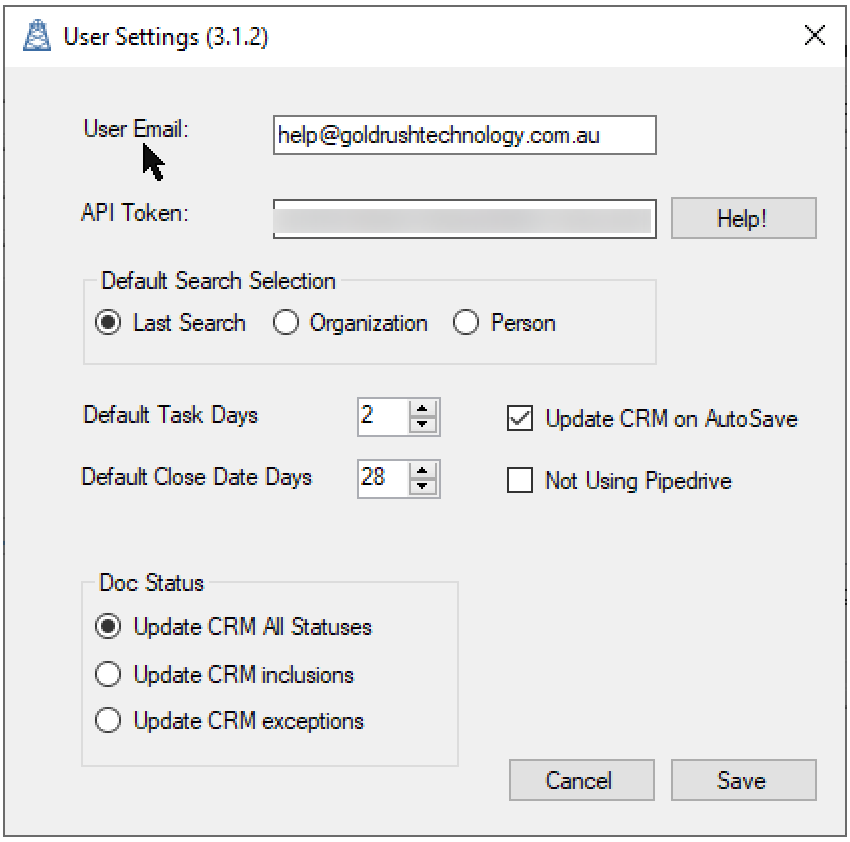
Delete Address Group

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 Search Selection

You can control your default search selection.

Last Search will mean that each time you search for a contact, it will use your last selection.

If you select Organization, when you search for a contact it will always default to Organization. The same is true if you select Person.

Default Task Days

This value will be added to the current day when creating activities, 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 Pipedrive is now disabled on Autosave. You can turn this on. You will need to restart QuoteWerks for this to take effect.

Not Using Pipedrive

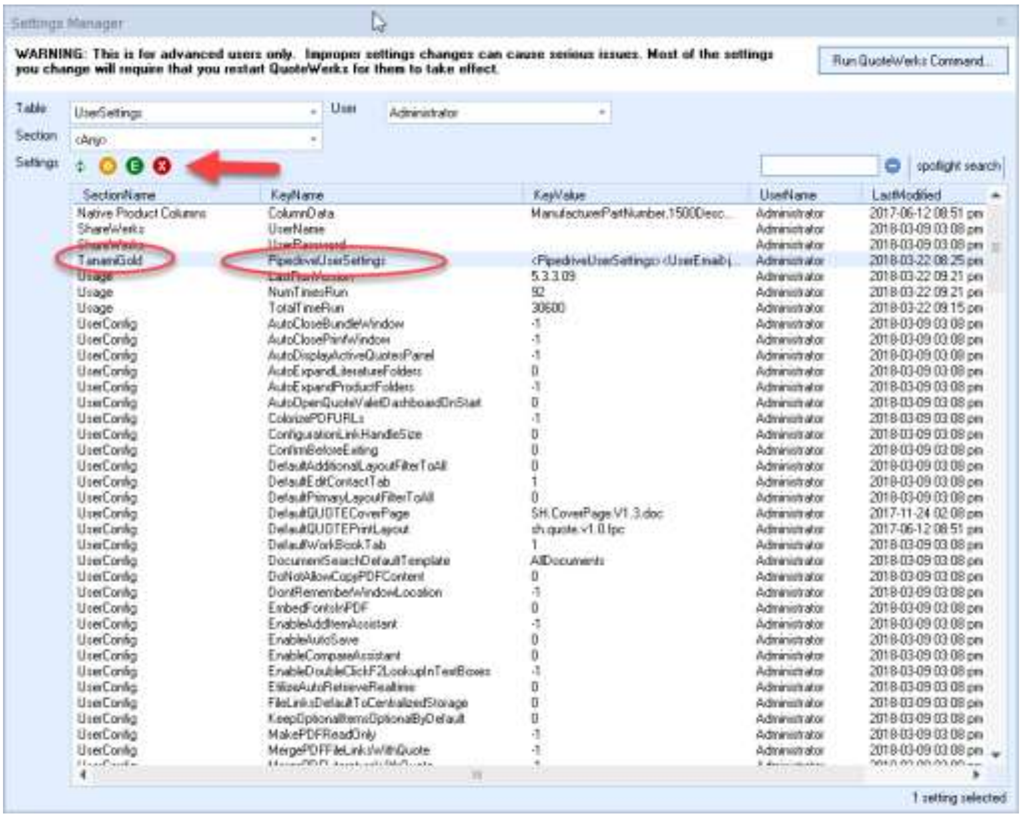
You may have users who use QuoteWerks, but don't use Pipedrive. Selecting this field will stop TanamiGold running when QuoteWerks starts.

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 Pipedrive 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

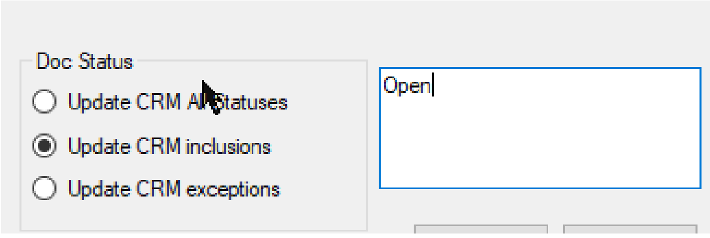
By default, the Update Pipedrive Deal occurs for every document status. However, if you often work on large quotes, that you need to save often, it can be annoying having the Update Pipedrive Deal window pop up on every save.

If you want to change this there are two options.

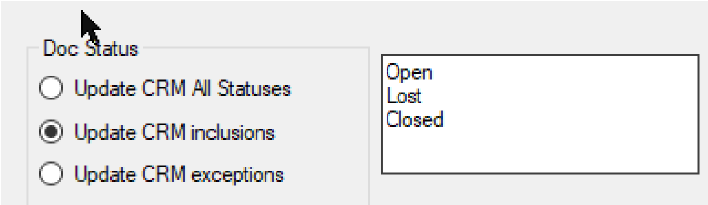
Update CRM inclusions

With this option, the Update Pipedrive 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.



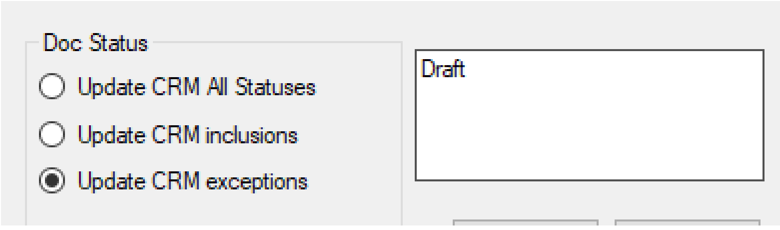
Please note, the statuses you type are not validated, so if you use this option, and don't list a valid status, then the Update Pipedrive Deal window will never pop up.

The values are not case sensitive.

Update CRM exceptions

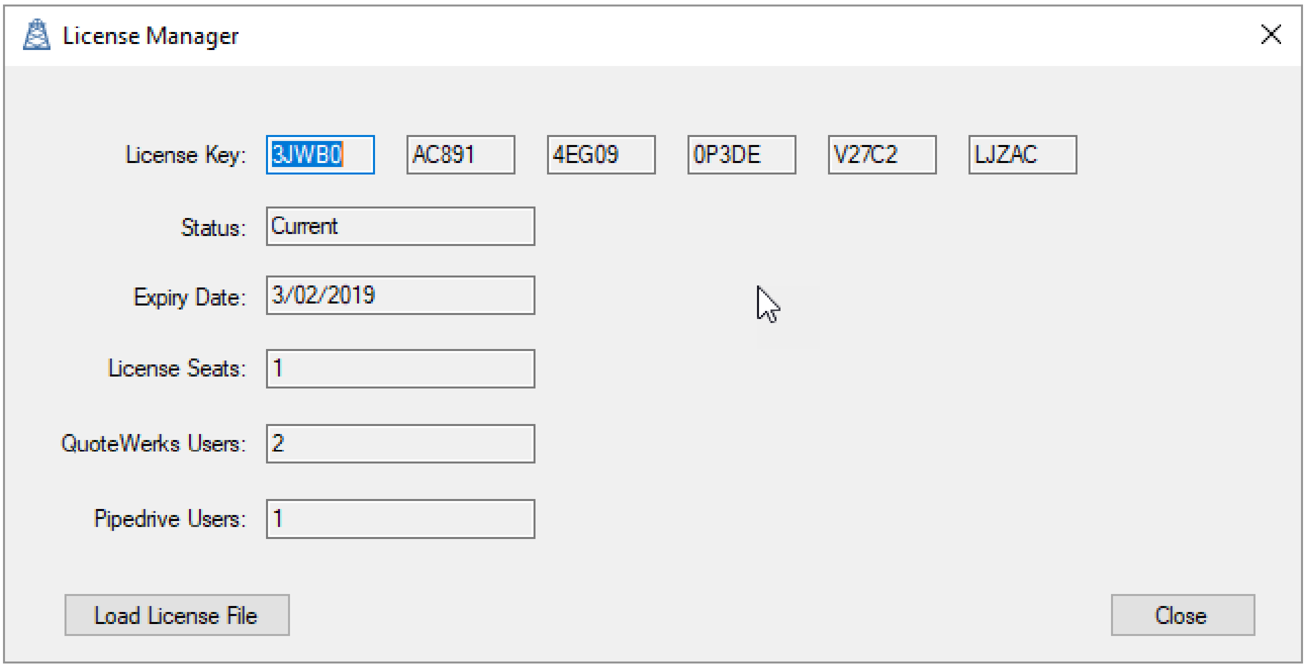
With this option, the Update Pipedrive Deal will only happen if the document status is not in the list of statuses.

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.



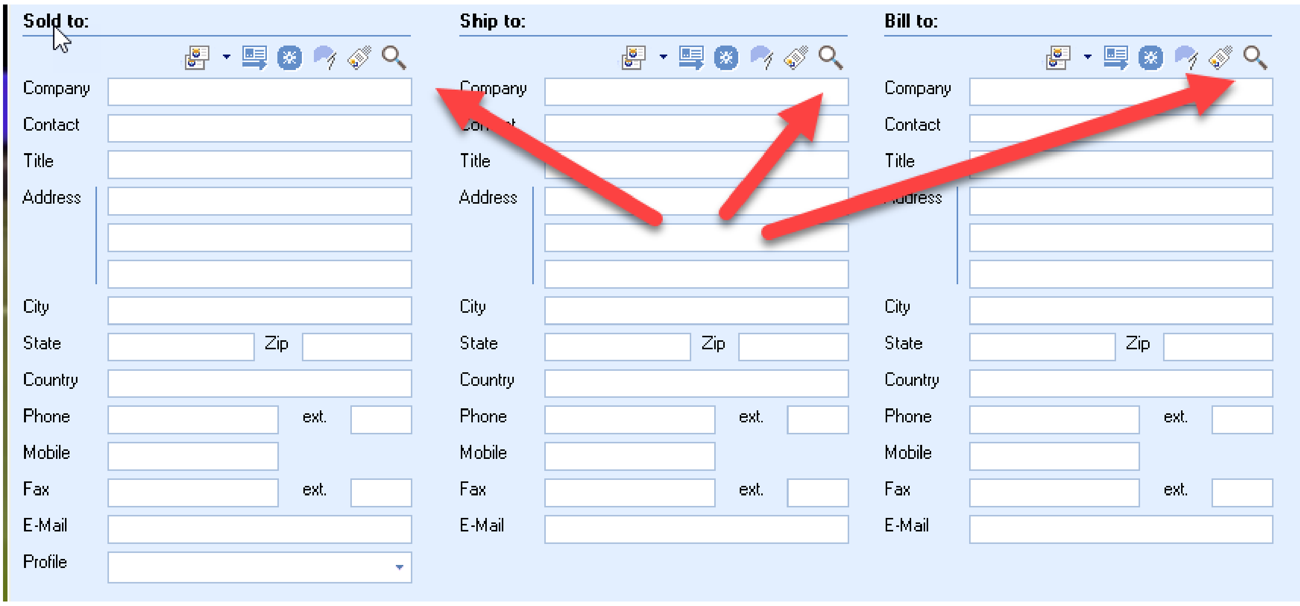
Menu Option – Help

This opens this help file.

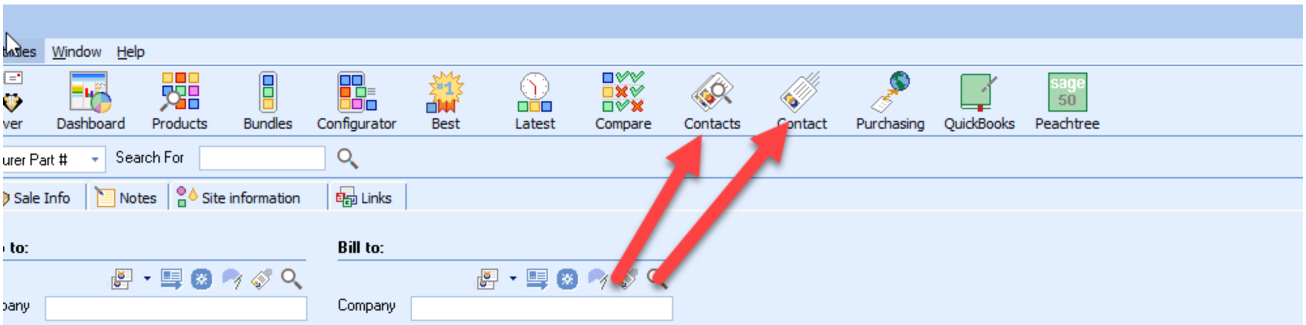
Contact Search

Accessing the Contact Lookup Window

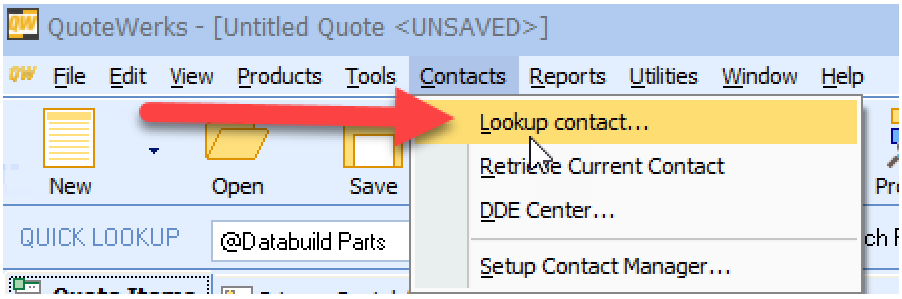
From the Sold To/Ship To tab, you can use the search button to open the Contact Lookup window.



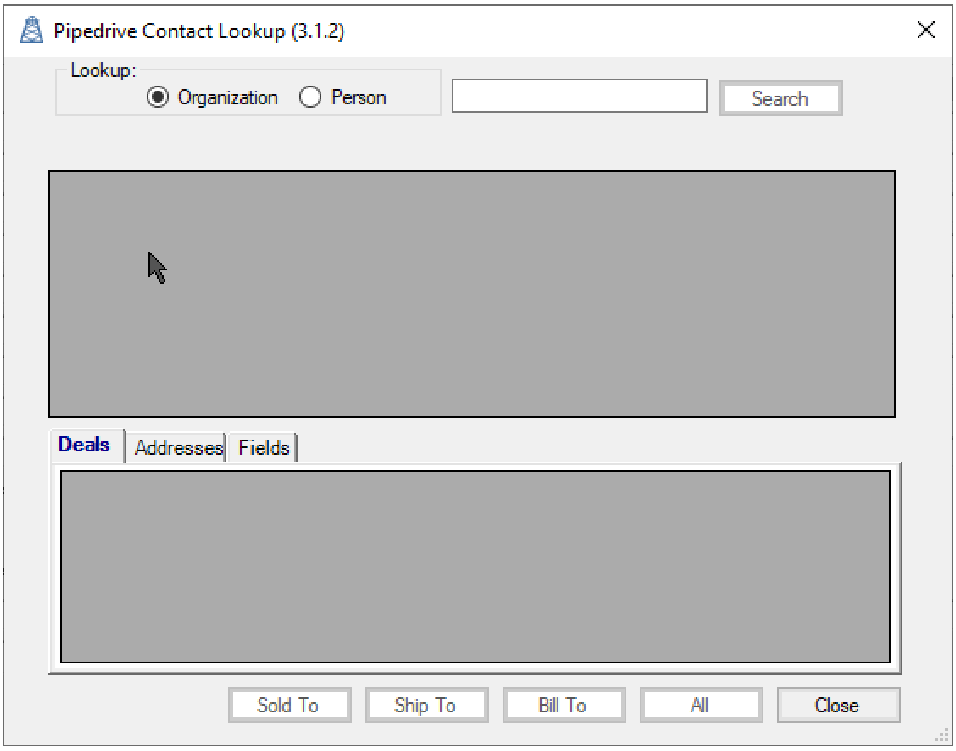
Or you can use either of the Contact buttons from the main menu



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



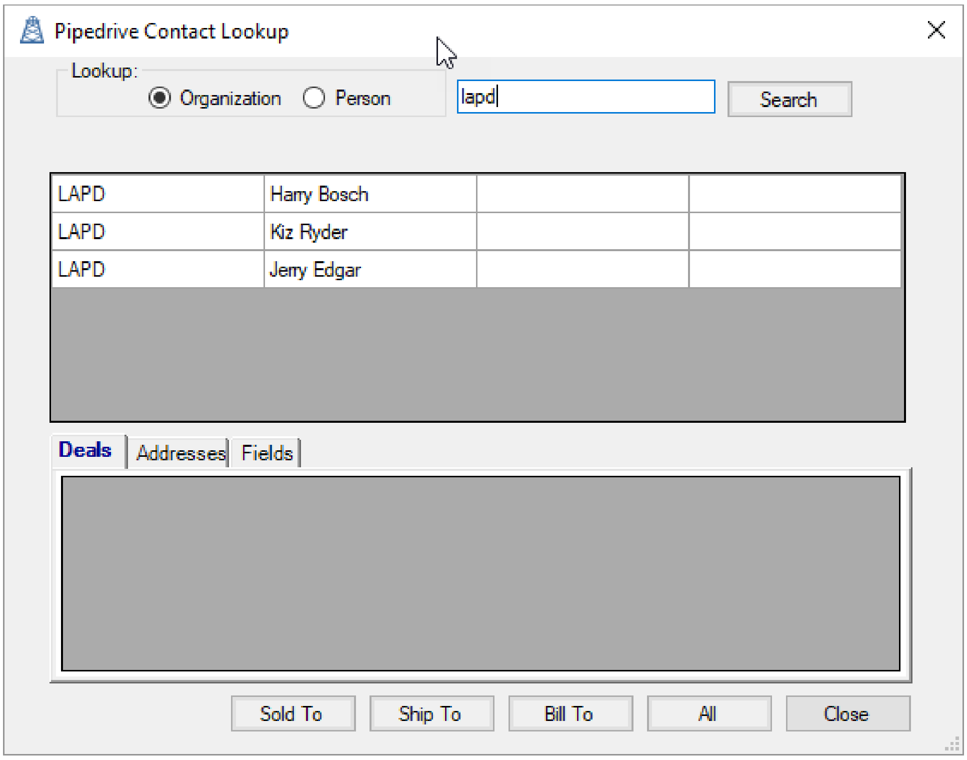
Pipedrive Contact Lookup



To search, select either Organization or Person.

Enter your search string in the search window. You need at least 2 characters to search.

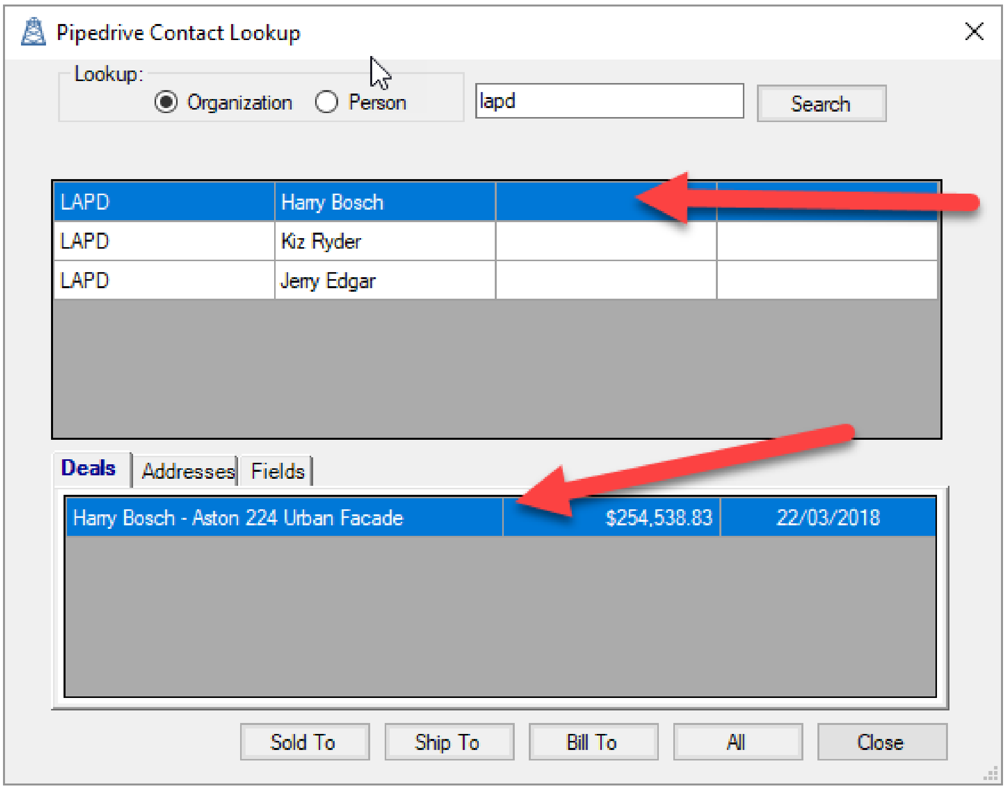
When you want to search, click on “Search”, or press <Enter>.



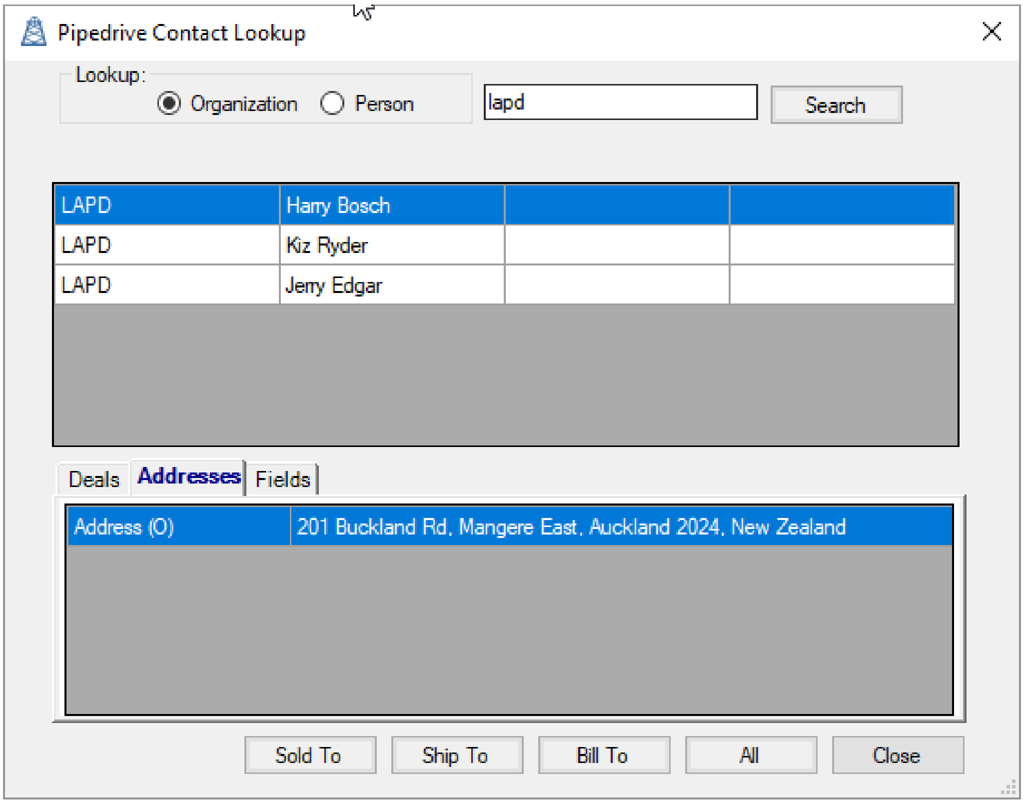
When you select a contact, it will search for all related Deals, Addresses and Mapped Fields.

If there is a deal, it will be selected.

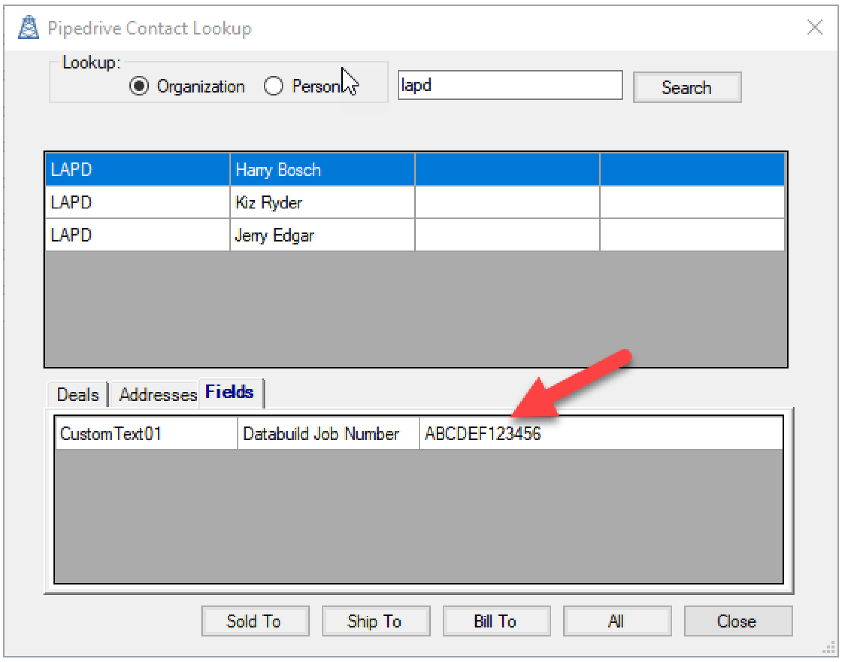
If you already have a Company/Organization or Contact/Person in the address field, the search will search for this entity automatically. This is particularly useful if you change some details of the contact in Pipedrive, and nee to refresh your quote.



All address fields associated with the selected organisation, person 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.



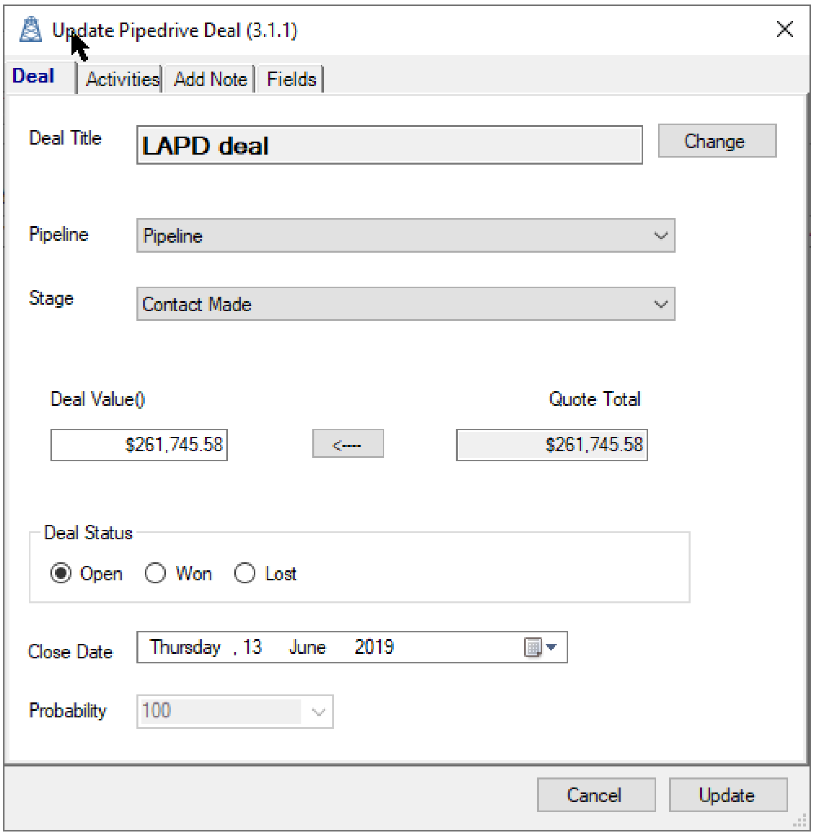
When you save the quote, you can change the deal, or you can create a new deal when you save the quote.

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 Pipedrive When Saving A Document

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



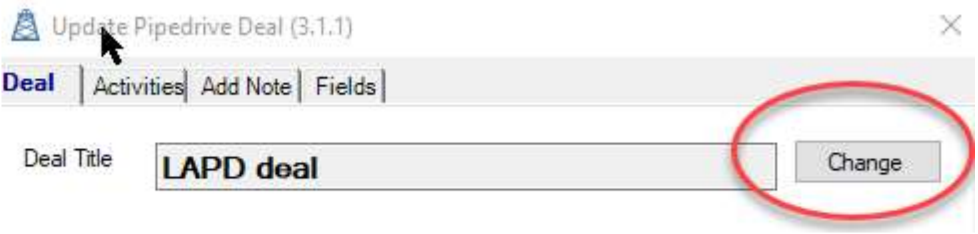
Updating the Deal

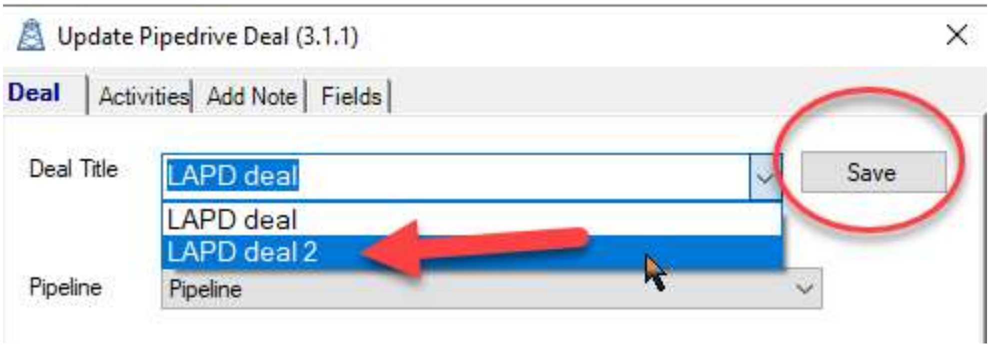
Deal Tab

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”.





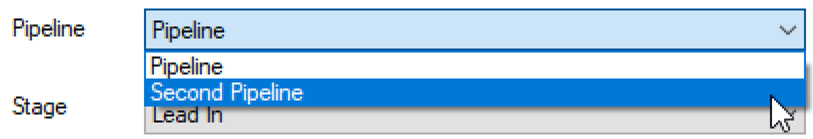
You can then change any other of the deal values, before clicking on “Update”

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.

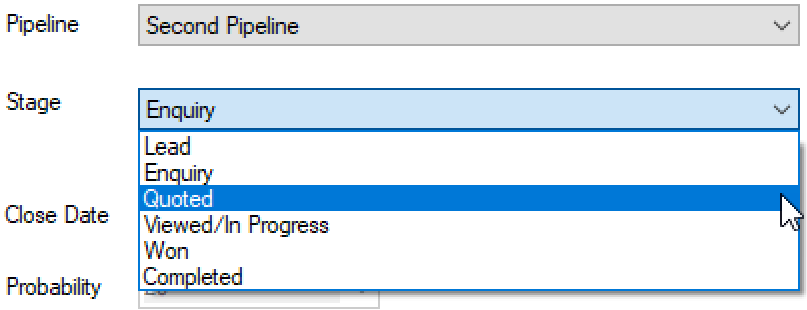
Pipeline & Stage

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.

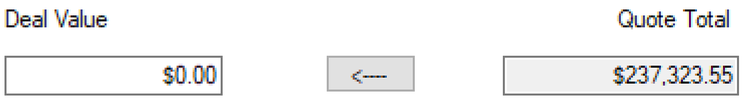
Just select the new stage from the dropdown list.

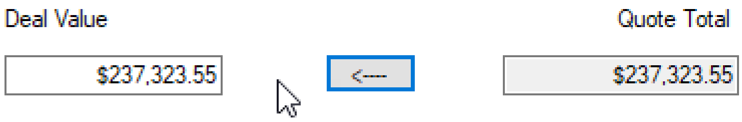


Deal Value

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.

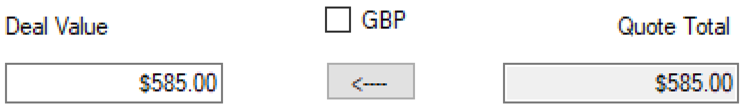




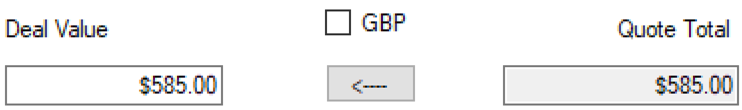
Managing Alternate Currencies

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

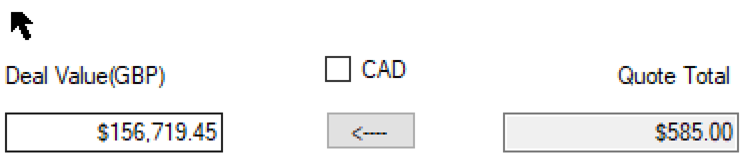
The following example is using your default currency, even though the alternate currency of GBP is selected on the quote.



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



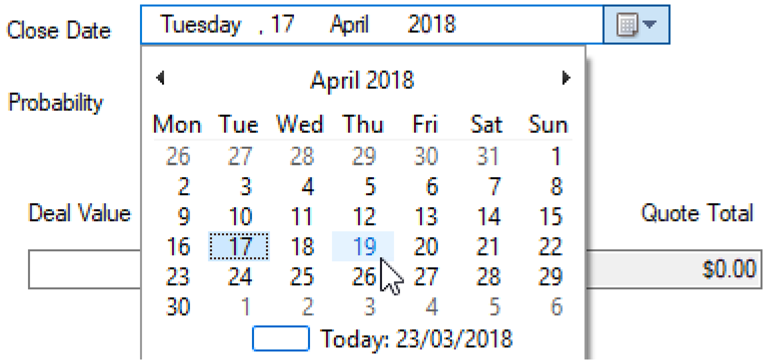
If the deal is using a different currency that the default or alternate currency it is shown o the Deal Value.



Close Date

If there is no close date set, when you select the date picker, it will default to todays date plus the number of days for Default Close Date Days set in the User Settings.

Click a second time if you need to change this.

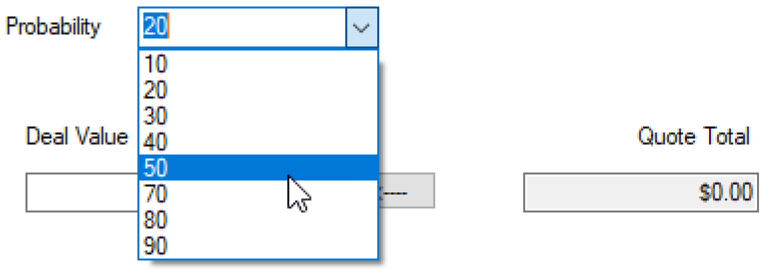


Probability

If the Deal Probability is enabled for the Pipeline, then you can change the probability of the deal.

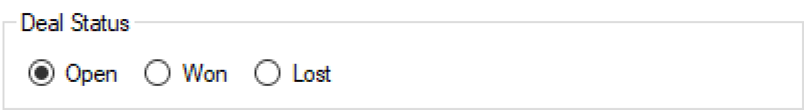
It must be a whole number between 0 and 100.

You can use the dropdown list for easy entry.



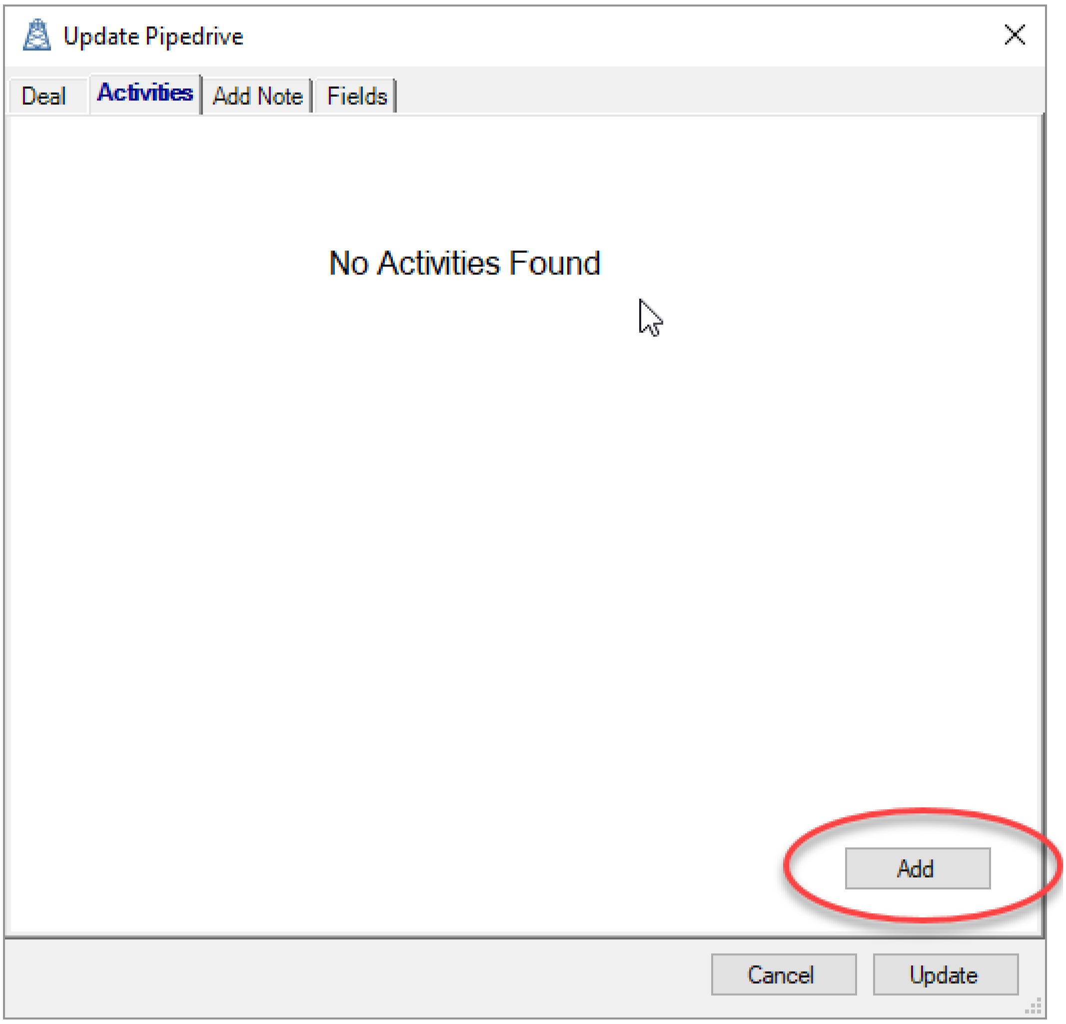
Deal Status

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.



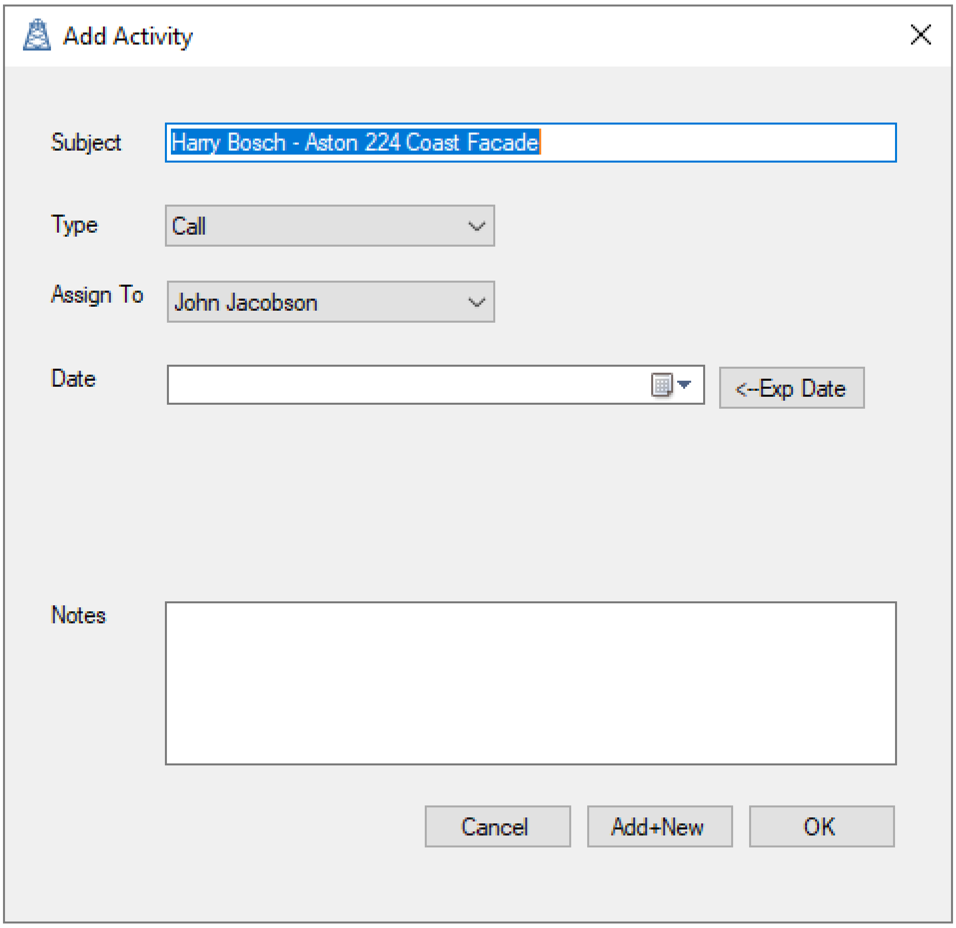
Activates Tab

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

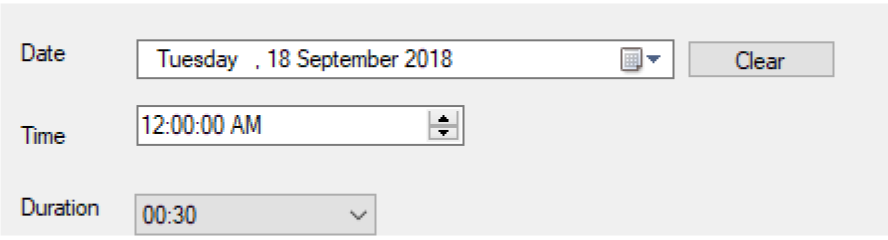


Add an Activity

When you click add, you can create a new activity in Pipedrive, linked to the deal.

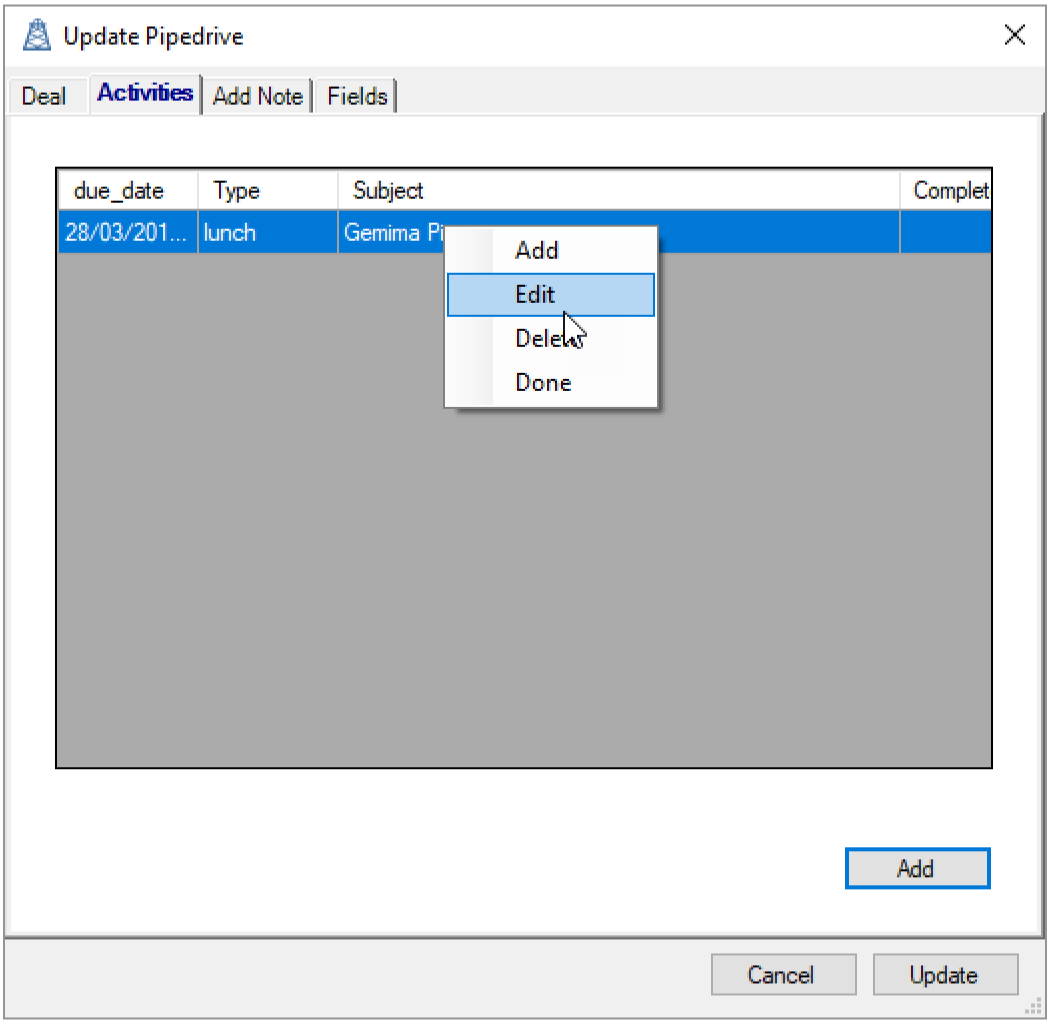


- The subject defaults to the deal title
- Use “Type” to select the type of activity you wish to create
- “Assign To” specifies which Pipedrive user is assigned to the activity
- The date will default to the number of days after the current day, as specified by the DefaultTaskDays User Setting if you 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



- “Notes” is any additional notes you want to make in relation to the activity and is optional.
- “Add+New” will add the activity, and then leave the window open (with all the same values), to allow you to add another activity.
- “OK” will add the activity and close the Add window.

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



Edit an Activity

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

Delete an Activity

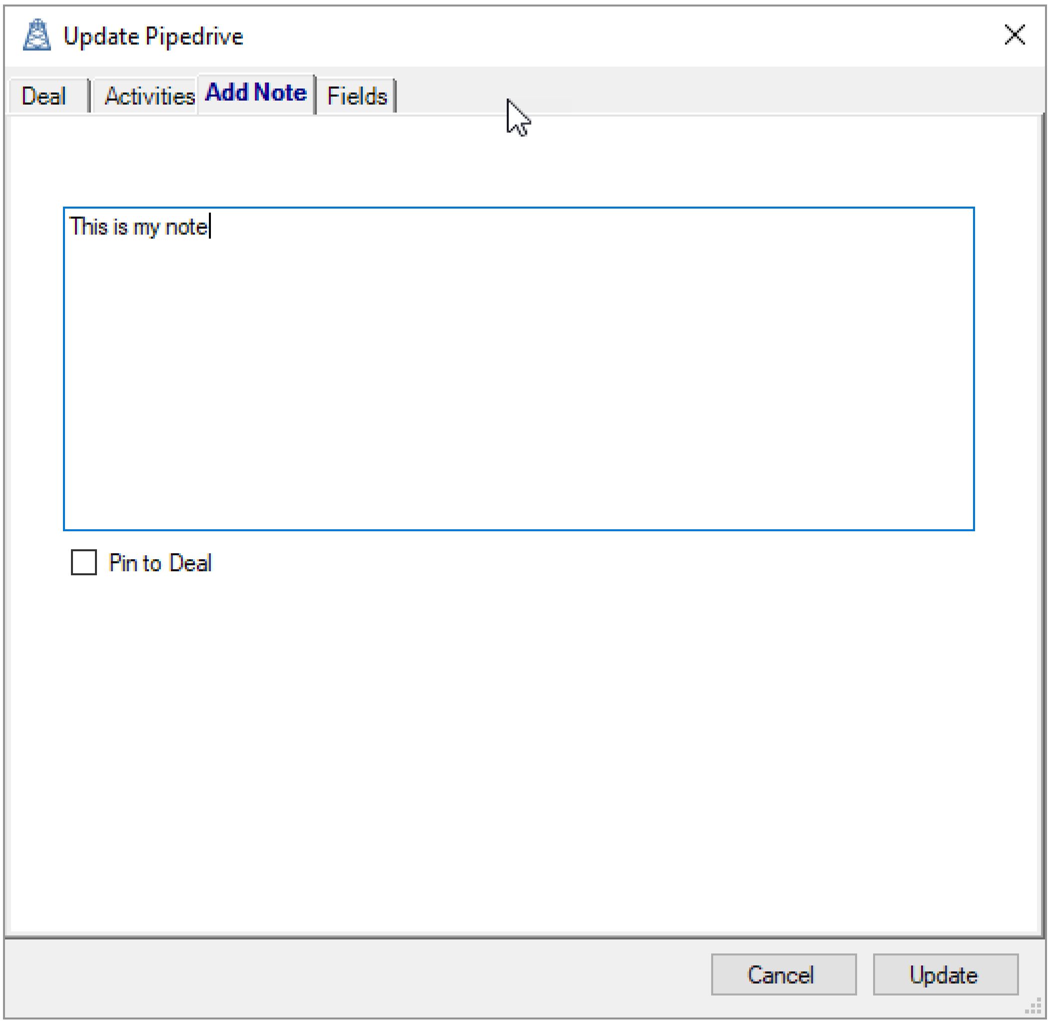
Selecting "Delete" will delete the activity.

Completing an Activity

Selecting "Done" will mark the activity as completed.

Note Tab

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

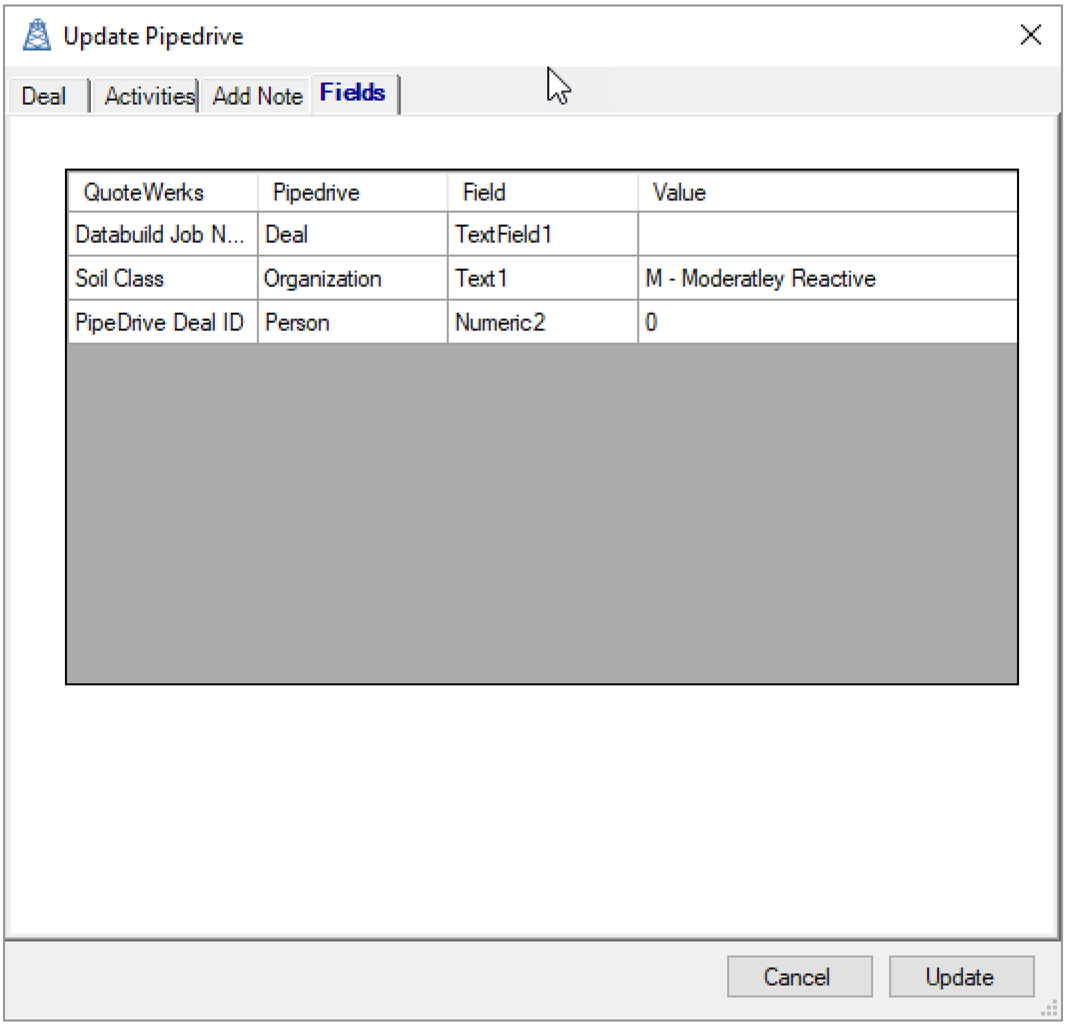


Selecting “Pin to Deal” will pin the note at the top of the deal.

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 Pipedrive. This managed by the Data Link Mappings in Settings, which is done by your administrator.



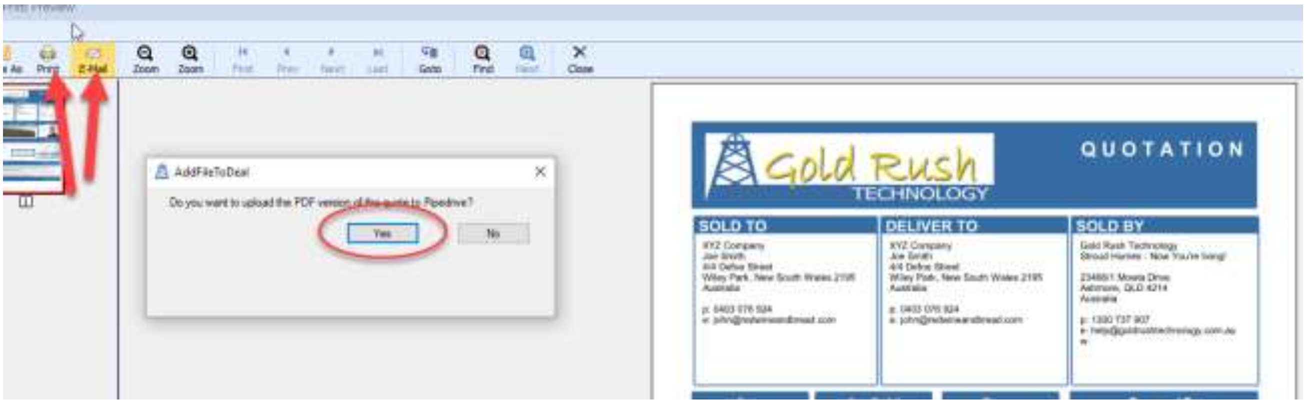
Note with Link To Open The Quote

When you update the quote, if it doesn't already exist, a pinned note will be added that is a link that will open the quote in QuoteWerks from the deal in Pipedrive. Of course, this assumes you have QuoteWerks on the computer you are using when you click on the link.

There is a known issue with the Pipedrive API that will take you away from Pipedrive when you click on this link. Just press the back button after you have opened your quote.

Uploading the PDF Version of the Quote to Pipedrive

From the Print Preview screen, when you press either “E-mail” or “Print”, you will get a small window asking if you would like to upload the PDF to Pipedrive.

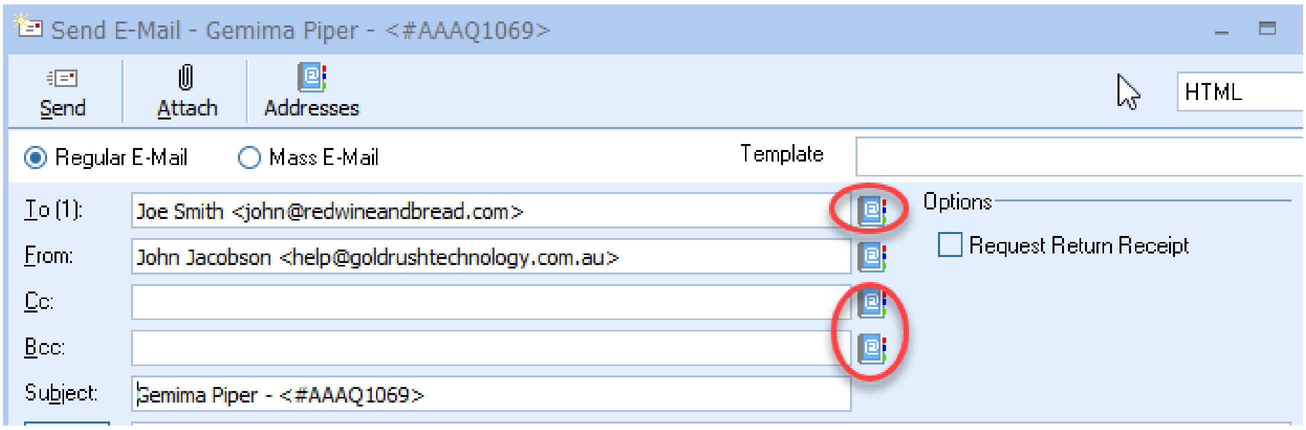


Click on “Yes”, and your PDF quote will be added to your deal in Pipedrive.

You must use Print Preview to be able to upload the quote to Pipedrive

BCC your Email to your Pipedrive Deal

If you want to send a blind copy (BCC) of your email to your Pipedrive deal, when you see the email window, select any of the email to selection buttons,



and the correct email address will be added to your email.

Support

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

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