

# Automated Marketing QuoteWerks Infusionsoft Plugin

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## Introduction

The Automated Marketing (AM) - QuoteWerks Infusionsoft Plugin allows the QuoteWerks Windows application to communicate to the Infusionsoft web based CRM system.

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## Features

- Infusionsoft Contacts can be searched and selected from QuoteWerks.
  - New Contacts can be created in Infusionsoft if created in QuoteWerks.
  - New Opportunity Entries can be created in Infusionsoft.
  - Transfer QuoteWerks Notes into Infusionsoft Opportunities.
  - QuoteWerks Quote Number can be added into Infusionsoft Contact Record notes.
  - QuoteWerks Quote DTF File can be uploaded into Infusionsoft Contact Record when saving.
  - QuoteWerks Quote PDF File can be uploaded into Infusionsoft Contact Record when emailing.
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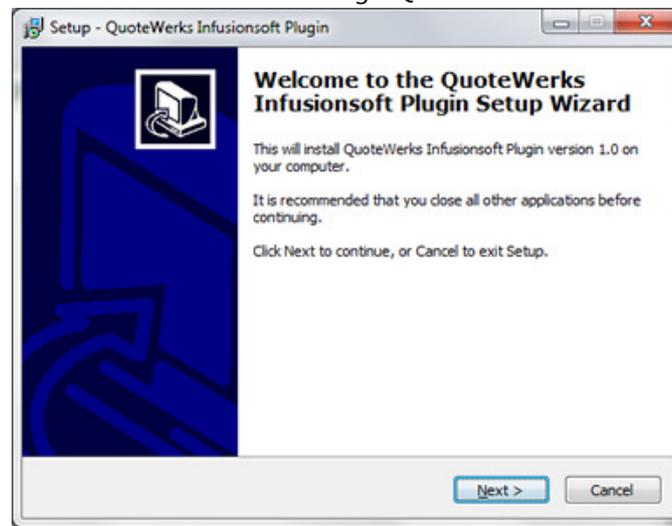
## Requirements

- MS Windows OS - XP, 2000, 2008, Vista, 7
  - QuoteWerks - v4.00 +
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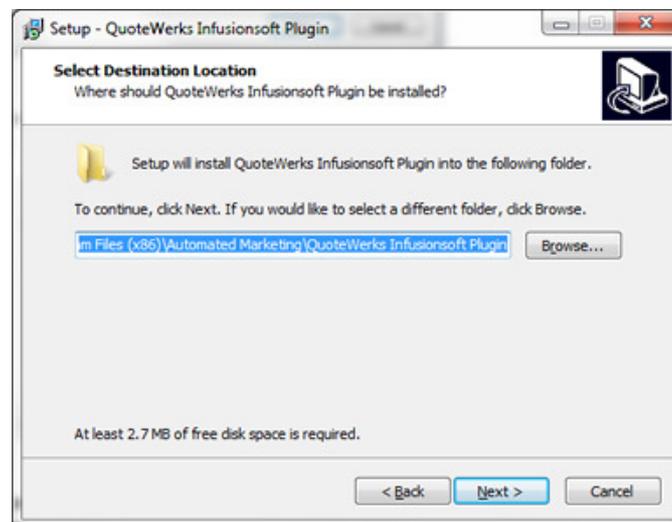
## Installation

To install the application you will need to do the following:

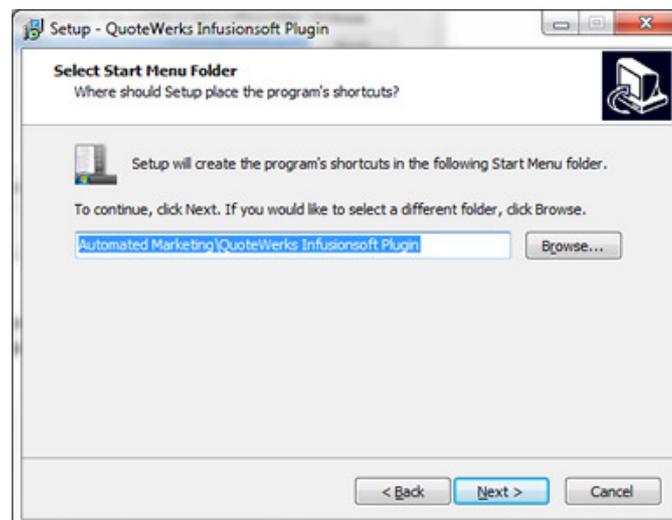
- Run the "**setup.exe**" program.
- You will now be shown the Welcome section.



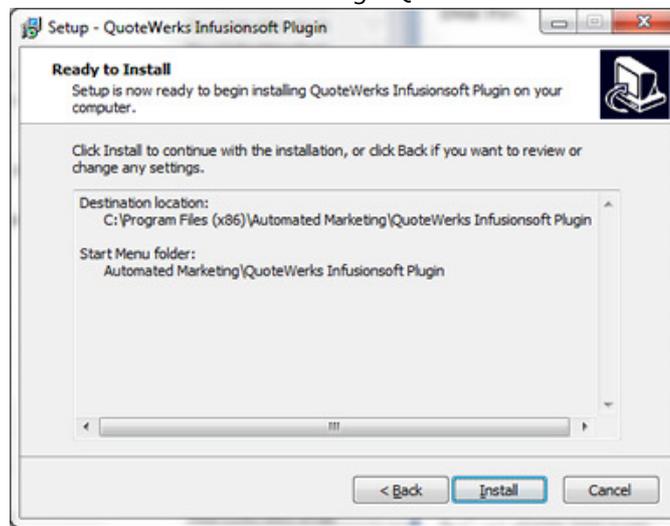
- Click on the "Next >" button to continue.
- The Destination Location section allows you to specify the location to install the plugin to, by default this will go into: *C:\Program Files\Automated Marketing\QuoteWerks Infusionsoft Plugin*



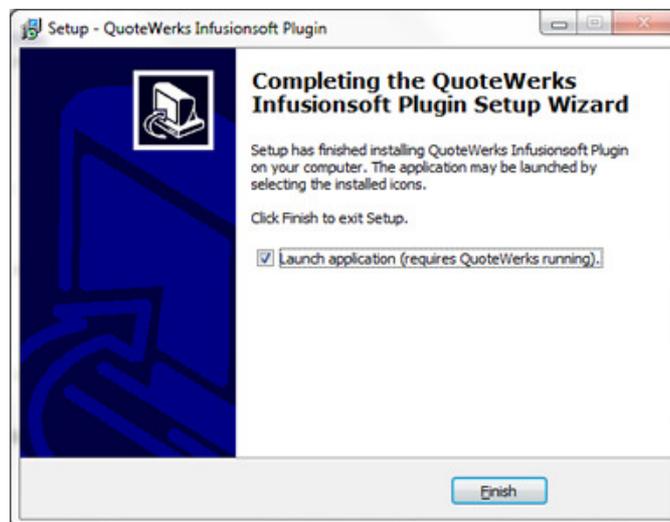
- Click on the "Next >" button to continue.
- The Start Menu Folder section allows you to specify the location of where to put the shortcuts in the Start Menu. By default this will be in: *Automated Marketing\QuoteWerks Infusionsoft Plugin*



- Click on the "Next >" button to continue.
- You will be shown the "Ready to Install" section, confirming your selection.



- Click on the **"Install"** button to continue. This will take several seconds to install the software.
- If you get a **"Reset Computer"** section during the installation, then select the option to Restart. After restarting your computer, you need to re-run the **"setup.exe"** program again.
- At the end of the installation, you will get an option if you want to run the plugin. You can do this if the QuoteWerks application is running.

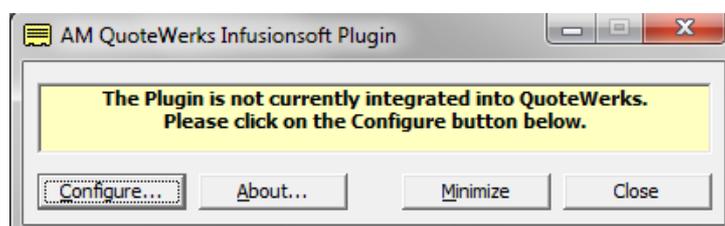


- If you have the "Launch application" checkbox ticked, then make sure the QuoteWerks application is running.

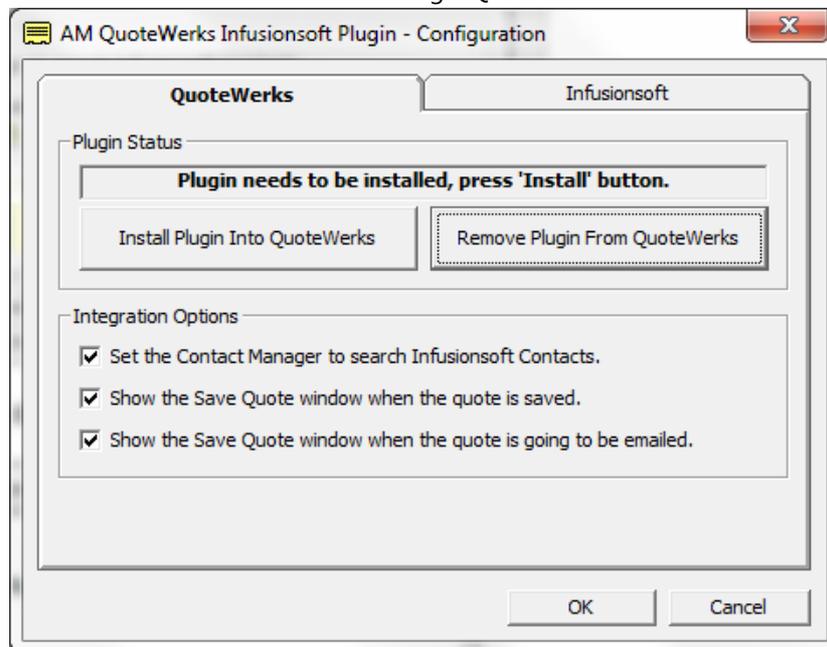
## Integrating the Plugin

If you did not launch the Plugin after the installation, you can launch it from the **Start Menu -> Automated Marketing -> QuoteWerks Infusionsoft Plugin -> QuoteWerks Infusionsoft Plugin** shortcut.

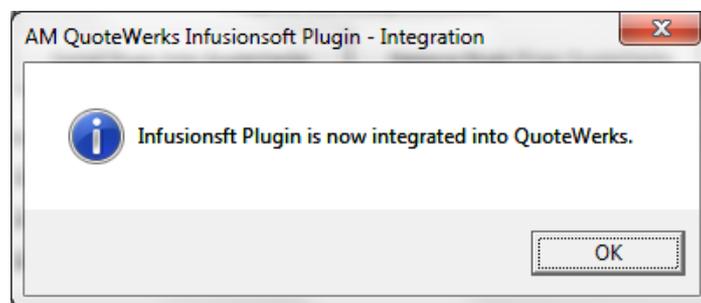
When the plugin is running, it will place an icon  in the system tray (bottom right) . It will also show the main screen, saying that plugin has not been integrated.



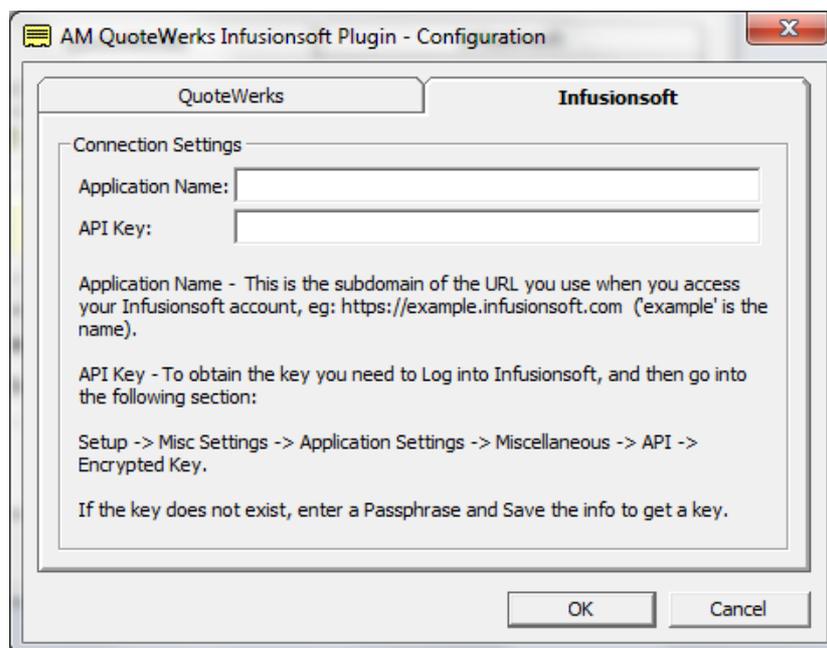
- Press the **"Configure"** button, and you will be shown the **"Configuration"** section.



- Press the **"Install Plugin Into QuoteWerks"** button. You will then get a message saying that it has been integrated.



- Press the **"OK"** button to the message.
- The next time you run the QuoteWerks application, the Plugin will automatically run in the background.
- Next, click on the **"Infusionsoft"** tab.

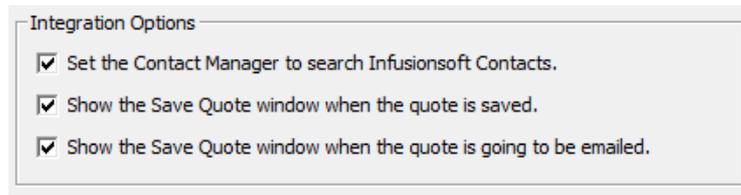


- You will need to enter the Application Name and API Key to allow the plugin to communicate to your Infusionsoft account. Instructions are given below the fields to how to retrieve the specific information.
- Once this has been entered, press the **"OK"** button.
- If there was a problem connecting to the Infusionsoft account, then you will get a warning message.
- Once you have finished, click on the **"Close"** button on the main window. The plugin will now exit.
- The next time you launch QuoteWerks, the plugin will now automatically start up.

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## Integration Options

In the "QuoteWerks" tab there are several integration options you can select.



### - Set the Contact Manager to search Infusionsoft Contacts

This option when ticked will make QuoteWerks to turn off the selected contact search option. When the Contact Search icon is pressed in QuoteWerks, it will bring up the Plugin Contact Search window instead. You will be able to search for a contact from Infusionsoft.

### - Show the Save Quote window when the quote is saved

After you save a quote in QuoteWerks, the plugin will show its own Save Quote window. From there you can choose how the Quote information should be recorded into Infusionsoft.

### - Show the Save Quote window when the quote is going to be emailed

When a quote is going to be emailed from QuoteWerks, this option allows the Save Quote window to be shown. An option will become available to allow you to upload a PDF copy of the quote into Infusionsoft.

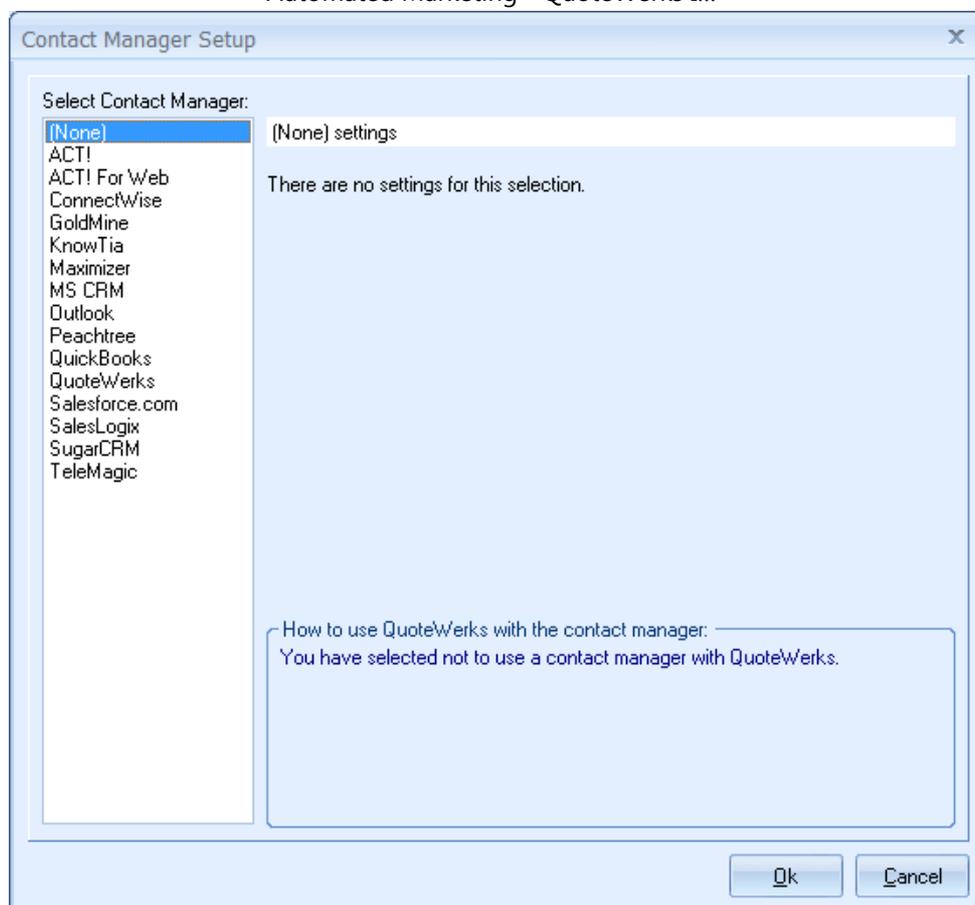
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## QuoteWerks Configuration

The Plugin will configure QuoteWerks to make it use it, and replace its default setup on the Contact Search.

But, if the integration option "**Set the Contact manager to search Infusionsoft Contacts**" was unticked, you can manually configure QuoteWerks to make it search for the Infusionsoft contacts instead.

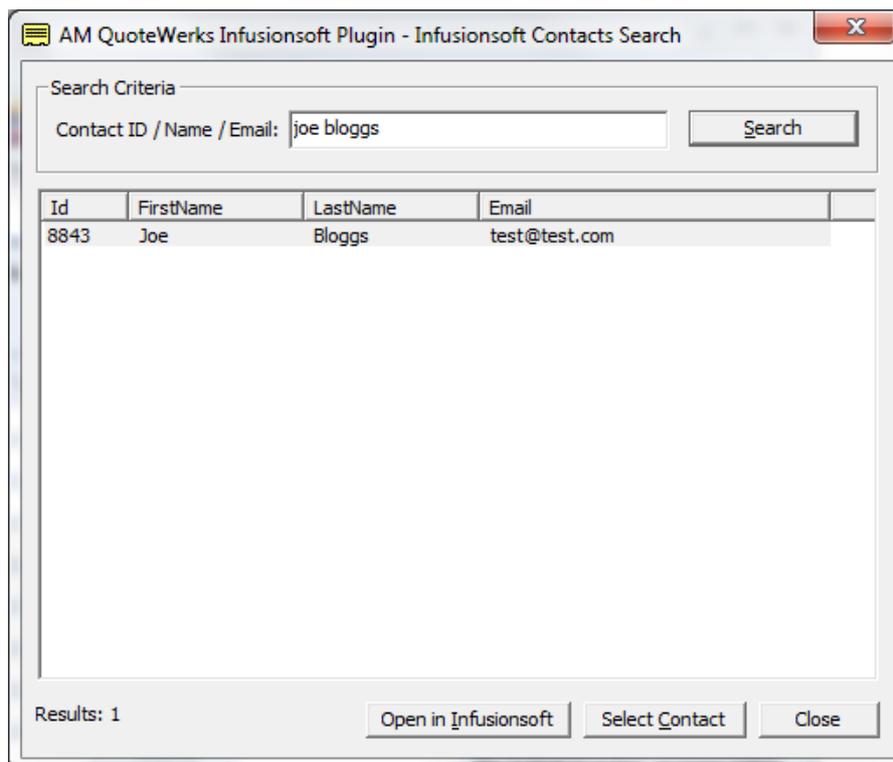
- In QuoteWerks, click on the "**Contacts -> Setup Contact Manager**" option.
- You will be shown the Contact Manager setup window.
- From there, select the "**(None)**" setting, and press "**OK**" to save it.



## Contacts Search

If the plugin is set to bring up the Infusionsoft Contacts, when pressing the Contact Search button in QuoteWerks, the plugin will bring up its own contact search window.

At the top of the window, you can enter the Infusionsoft Contact ID, Name, or Email address, then press the "Search" button.



To place a contact in QuoteWerks, you can **double click** on the contact, or select and press "**Select Contact**" button.

The "**Open in Infusionsoft**" button allows you to view the contact details in Infusionsoft.

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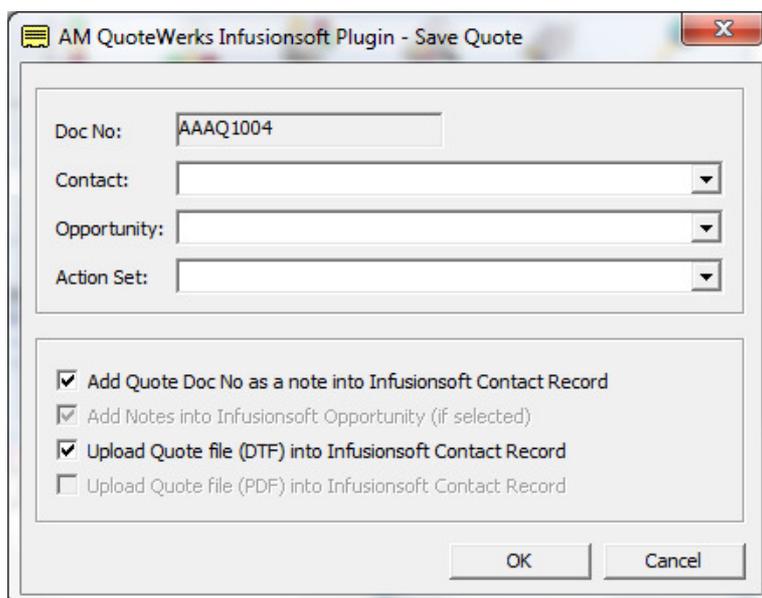
## Save Quote

If the plugin is configured to show its own Save Quote window, the following window will appear.

Prior it appearing, it will check if there is a stored email address in the Sold To/Ship To section of QuoteWerks.

### Save Quote - New Contact

If the contact email address is not found in Infusionsoft, the Save Quote window will show blank selections in the drop down list.



In the "Contact" list, you can select from the drop down list which QuoteWerks Sold To / Ship To / Bill To contact details to use to create in Infusionsoft.

In the "Opportunity" list, you can select if you want to create a new opportunity in Infusionsoft, or leave it blank if you want none made.

In the "Action Set" field, you can select the action set you want to run from Infusionsoft, or leave it blank if you want none to be run.

### Save Quote - Existing Contact

If a contact was found in Infusionsoft, the Save Quote window will setup differently.

The Contact list will prefill itself with the Contact details.

The Opportunity list will show a list of the previous opportunities made for that contact.

You can still select the option to create no opportunities, or no action sets to run.

## Save Quote - Options

There are 4 options that can be selected from the Save Quote window.

### - Add Quote Doc No as a note into Infusionsoft Contact Record

This option will create a new note in the Contact Record - Tasks - Notes section with the Action Description and Creation Notes containing the QuoteWerks Quote Number.

Prior to adding the note, if one already exists with the same Quote Number, a new one will not be created.

### - Add Notes into Infusionsoft Opportunity (if selected)

If an opportunity selection has been made, this option will update the notes for the Opportunity in Infusionsoft.

### - Upload Quote file (DTF) into Infusionsoft Contact Record

This option will upload a copy of the QuoteWerks Quote file into Infusionsoft Contact Record - File Box section.

This option can act as a backup for the quote. Also, if you want people to see the quote, they can go into the person Contact Record and download it from the File Box section.

### - Upload Quote file (PDF) into Infusionsoft Contact Record

This option will only become available, if the Integration option "**Show the Save Quote window when the quote is going to be emailed**" has been selected.

When the Save Quote window appears when an email is going to be sent, the Upload option allows you to save a PDF copy of the Quote file into Infusionsoft Contact Record - File Box section.

## Technical Info

### Site.ini

Below is an example of how the QuoteWerks v4+ - "Site.ini" file looks like when the Plugin has been integrated into it.

Key lines are the "DefaultContactManager" which when set to "10" turns off the QuoteWerks Contact Search.

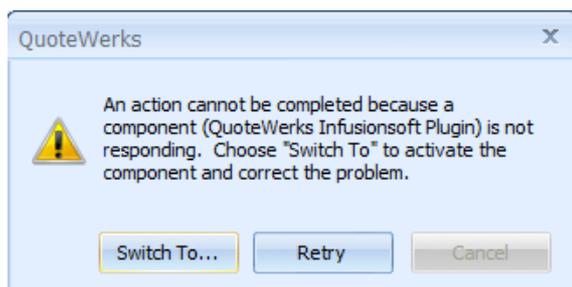
The "AutoRun1" specifies to run the Plugin when QuoteWerks is started.

```
-----  
[QuickBooks]  
Memo=Imported from QuoteWerks Doc# &DH_DocNo (on &SYS_Now)  
[System]  
Version=4.5  
Build=10  
FirstInstalledVersionBuild=4.5.10  
InstallDate=20101209  
SyncVersionBuildBreaksList=4.0,4.5,4.5.2,4.5.6,4.5.8  
LocalTaxRate=0.175  
LastMaintenanceReminderOn=10/01/2011  
[Contact Managers]  
DefaultContactManager=10  
[ICEcat]  
Language=English (UK)  
[Addons]  
AutoRun1=C:\Program Files\Automated Marketing\QuoteWerks Infusionsoft Plugin\InfusionsoftPlugin.exe  
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```

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## Questions and Answers

Q. QuoteWerks is showing the following message "An action cannot be completed because a component (QuoteWerks Infusionsoft Plugin) is not responding. Choose "Switch To" to activate the component and correct the problem.



A. Just click on the "Switch To..." button, and it will switch the window to the plugin instead.

If the plugin is not responding, bring up the Windows Task Manager (CTRL + SHIFT + Escape), go into the "Processes" tab, click on the "InfusionsoftPlugin.exe" and press the "End Process" button to end it.

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## Feedback

If you have any feedback, problems, suggestions, etc. please send them to the following:

### Automated Marketing

Web: <http://www.automatedmarketing.co.uk>

Email: [info@automatedmarketing.co.uk](mailto:info@automatedmarketing.co.uk)