

# Enable Integration with Infusionsoft

HappyFox integration with Infusionsoft CRM lets you access your customer information from your HappyFox interface and also push ticket information from HappyFox to Infusionsoft.

You would need an active Infusionsoft CRM subscription to enable this integration.

To configure the integration process in HappyFox, the administrator needs to create an account with Infusionsoft CRM. You need an account name and an API key to enable the integration.

Once the account is created with Infusionsoft CRM, perform the steps below in HappyFox to complete the integration.

1. To enable Infusionsoft CRM, go to "Manage" >> "Integrations".
2. Under External, click on "configure" link across "CRM integration" option.
3. Select "Infusionsoft" under the CRMs listed.
4. Under CRM setup, Enter the "AC name" and "API key" from your infusionsoft account.
5. Click on "Save Settings".

Once you perform these steps, you need to select "Yes" in "Basic CRM settings" section, located above the CRM setup and click on "Save Settings" for that section.

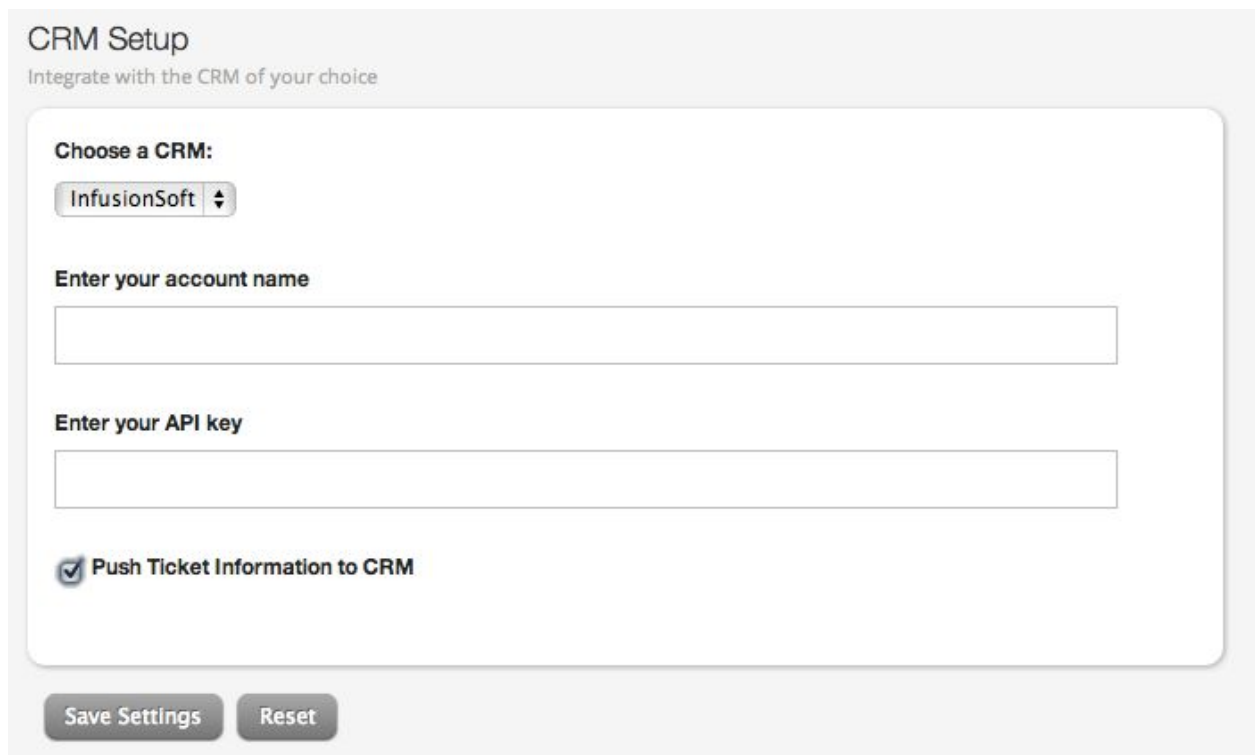
Your integration with Infusionsoft is now complete.

The screenshot displays the 'Test Company' Helpdesk interface. The top navigation bar includes links for 'New Ticket', 'Forum', 'My Settings', 'Admin's First Name Admin's Last Name', and 'Support'. Below this, a secondary navigation bar shows 'Dashboard', 'Tickets' (active), 'Manage', 'Contacts', 'Reports', and 'Knowledge Base'. The 'Tickets' section is further divided into 'My Queue', 'Pending' (active), 'All', 'New', 'Open', 'On Hold', 'Solved', and 'Closed'. The main content area shows a ticket titled 'test ticket (1)' with ID '#DC00000012'. The ticket status is 'OPEN' and the description is 'checking infusion soft crm'. It was last updated '28 seconds ago'. The ticket is assigned to 'jim', raised by 'jim', with a priority of 'Low' and a category of 'Default Category'. The due date is 'Not Set'. Below the ticket details, there are sections for 'Contact Information' (No custom fields), 'Additional Information' (No custom fields for this ticket's category), and 'Customer Info from Infusionsoft CRM'. The customer information for 'Jim White' includes: Website 'www.example.com', City 'Newyork', Company 'Newman Inc', Phone5Type 'Work', Phone2Type 'Work', FirstName 'Jim', Email 'jim@example.com', Fax2Type 'Work', Country 'American Samoa', PostalCode '42646124', Phone3Type 'Work', JobTitle 'Senior Manager', and Phone1Type 'Work'. The 'Messages' section shows a message from 'jim' at '28 seconds ago' with the text 'checking infusion soft crm'. Below the message, it states 'Ticket created by Staff Admin's First Name Admin's Last Name, Status set to Open, priority set to Low'. The 'Current Status' section shows 'OPEN' with buttons for 'Add Update' and 'Add Private Note'. At the bottom, there are links for 'Merge Ticket', 'Add Related Ticket', and 'Delete'. The footer indicates 'Help Desk Software powered by Helpdesk Pilot, © 2011-2013, Tenmiles Technologies'.

The information pulled from Infusionsoft CRM will be available on the "Tickets details" page, "New Tickets" page and "Contacts" page.

You can also push ticket updates from HappyFox to Infusionsoft. All customer and help desk staff updates on the ticket will be pushed to the email history of the contact in Infusionsoft CRM.

To enable this setting click checkbox "Push ticket information to CRM".



The image shows a 'CRM Setup' form with the subtitle 'Integrate with the CRM of your choice'. The form is contained within a light gray box. Inside the box, there is a section titled 'Choose a CRM:' with a dropdown menu currently showing 'InfusionSoft'. Below this are two text input fields: 'Enter your account name' and 'Enter your API key'. At the bottom of the form is a checkbox labeled 'Push Ticket Information to CRM', which is checked. Below the form box are two buttons: 'Save Settings' and 'Reset'.

**CRM Setup**  
Integrate with the CRM of your choice

**Choose a CRM:**  
InfusionSoft

**Enter your account name**

**Enter your API key**

☒ **Push Ticket Information to CRM**

**Save Settings** **Reset**

To note : The ticket information does not include Private notes added to the tickets.