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.

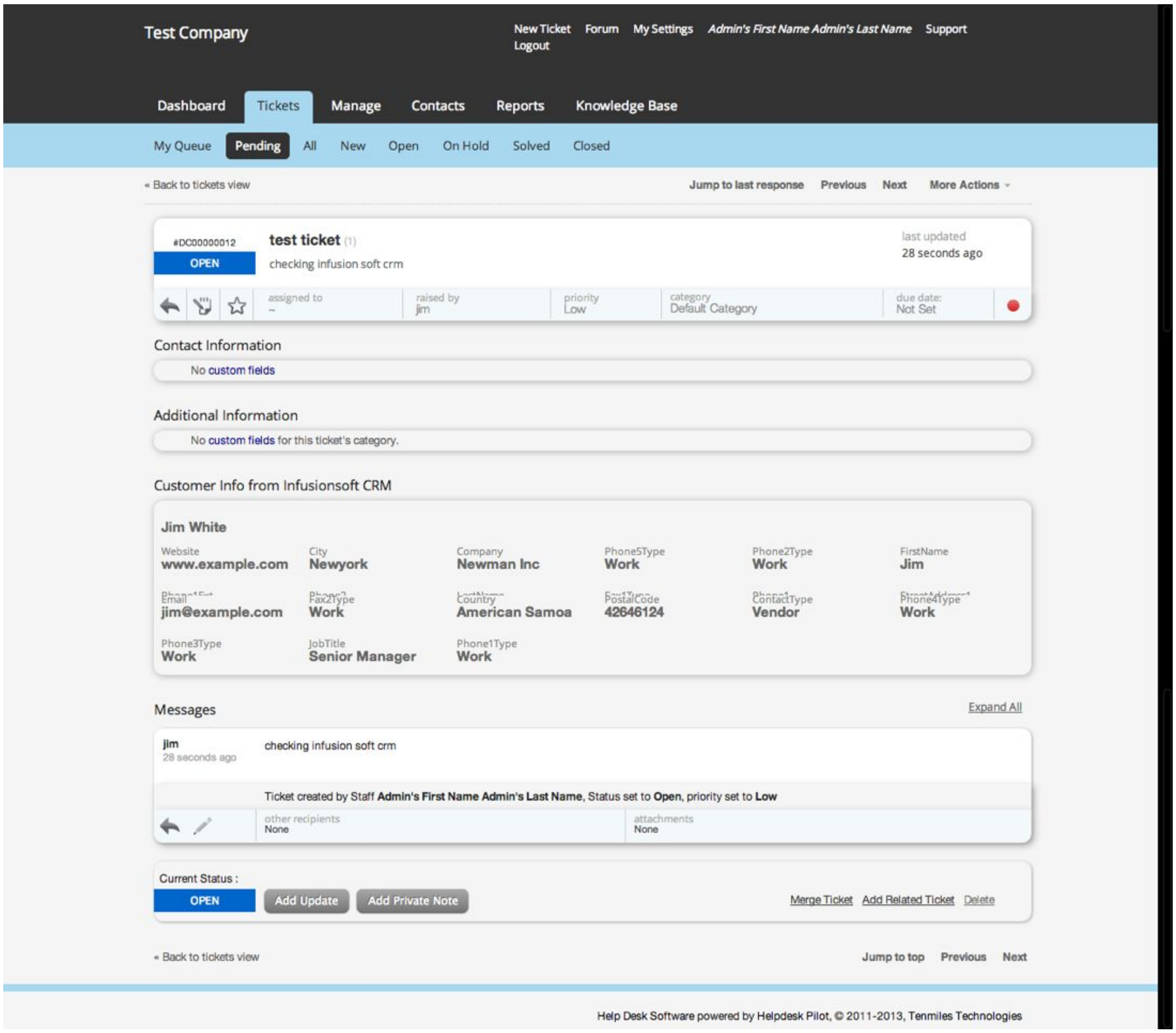
3. Select "Infusionsoft" under the CRMs listed.

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.

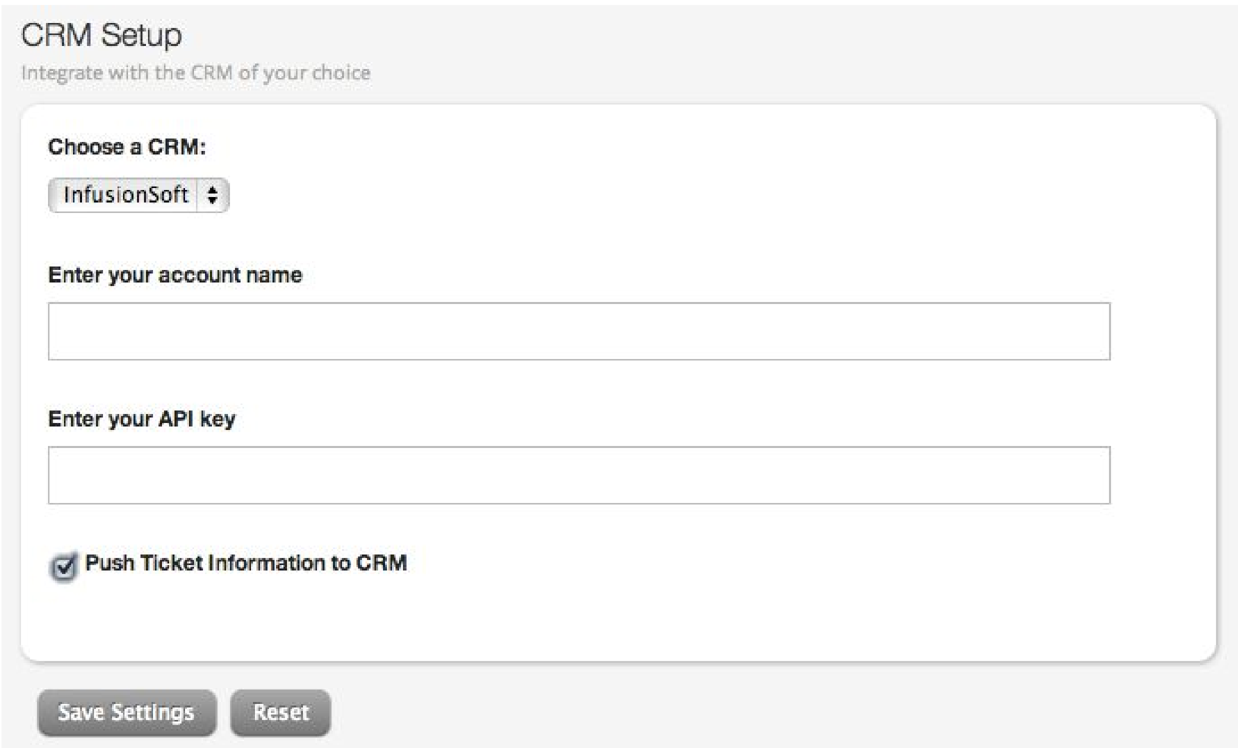
Your integration with Infusionsoft is now complete.



The 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".



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