

# Enable integration with Highrise

HappyFox integration with 'Highrise CRM' lets you access your customer information from your HappyFox interface, and also allows you to view the tickets associated with Highrise customers in Highrise interface. You would need an existing Highrise CRM subscription to enable this integration.

To enable HighRise CRM integration do the following:

1. Get API Key from My Info > API Token section in HighRise.
2. Go to Manage > Integrations page in HappyFox.
3. Below the External section click Configure button near 'CRM Integration'.
4. Change CRM Integration Active to "Yes"
5. Choose "HighRise" under Choose a CRM option
6. Enter your HighRise CRM URL and Authentication token provided by Highrise.
7. Click "Save Settings".

## CRM Integrations

[Back to Integrations](#)

### Basic CRM Settings

Application wide CRM settings

CRM Integration active:

Yes 



[Save Settings](#)

[Reset](#)

### CRM Setup

Integrate with the CRM of your choice

Choose a CRM:

Highrise 

Enter your CRM account URL

Enter the authentication token

[Save Settings](#)

[Reset](#)

Once this is done, a section with heading "*Customer info from HighRise CRM*" appears in your ticket details page with your customer information displayed from Highrise.

#SEO00000550 **Need an update on the invoice i sent you on September 25th** (1) last updated  
4 seconds ago

**NEW** Hi, Need an update on the invoice i sent you on September 25th. S.No . 2478234 Thanks, John App...

← ↩ ☆ assigned to ~ raised by John Appleseed priority Normal category SEO due in: 1 day

**Contact Information** [edit](#) [change contact](#)

Alternate Contact Number ~

**Customer Info from Highrise CRM**

Phone (Work) <b>37895433</b>	Title <b>CEO</b>	Last Name <b>Appleseed</b>	Customer ID <b>23456</b>	Company <b>MayAppleJems</b>	Website (Work) <b>http://mayjem.com</b>
Twitter (Personal) <b>Mayjem</b>	First Name <b>John</b>	Address (Work) <b>23, Longhorn SteetNewyork, 10001. NY. United</b>	Referred By <b>Ted Williams</b>	Email (Work) <b>johna@example.co m</b>	

**Messages** [Expand All](#)

**John Appleseed** 4 seconds ago  
Hi,  
  
Need an update on the invoice i sent you on September 25th.  
S.No . 2478234  
  
Thanks,  
John Appleseed

Ticket created by Staff **Prasanna Kumar**, Status set to **New**, priority set to **Normal**, set due date to **24 Sep 2013**

← ↩ other recipients None attachments None

Current Status : **NEW** [Add Update](#) [Add Private Note](#) [Merge Ticket](#) [Add Related Ticket](#) [Delete](#)

Contact information from Highrise will be displayed under "*Contact info from Highrise CRM*" section in the Contact Detail page, corresponding to the customer name and also in the HappyFox New Ticket form when searching for the contact that exists in Highrise CRM.

## Contact Details

Basic Information [edit](#) [merge](#)

[Delete](#)

John Appleseed

[johna@example.com](mailto:johna@example.com)

**1** Total Ticket  
[View all](#)

**0** Pending Tickets  
[View all](#)

## Contact info from Highrise CRM

Phone (Work)  
**37895433**

Title  
**CEO**

Last Name  
**Appleseed**

Customer ID  
**23456**

Company  
**MayAppleJems**

Website (Work)  
**<http://mayjem.com>**

Twitter (Personal)  
**Mayjem**

First Name  
**John**

Address (Work)  
**23, Longhorn  
SteetNewyork, 10001,  
NY, United States**

Referred By  
**Ted Williams**

Email (Work)  
**[johna@example.com](mailto:johna@example.com)**

Dashboard Tickets Manage Contacts Reports Knowledge Base

## New Ticket

### Look Up Existing Contact

Enter Name or Email Address

Look Up

### Contact Info

**John Appleseed**  
[johna@example.com](mailto:johna@example.com)

1 Total Tickets [view all](#)

0 Pending Tickets

**Contact Info from Highrise CRM**

Phone (Work)  
**37895433**

Title  
**CEO**

Last Name  
**Appleseed**

Customer ID  
**23456**

Company  
**MayAppleJems**

Website (Work)  
**http://mayjem.com**

Twitter (Personal)  
**Mayjem**

First Name  
**John**

Address (Work)  
**23, Longhorn  
SteetNewyork, 10001, NY,  
United States**

### Create New Ticket

Contact details [Clear](#) | [Clear All](#)

**Full Name \***

**Email Address \***

**Phone Number**

**Alternate Contact Number**

Ticket details

**Category \***

**Priority**

**Assignee**

**Status**

**Due Date**

[Add CC](#) | [Add BCC](#) | [Attach a File](#)

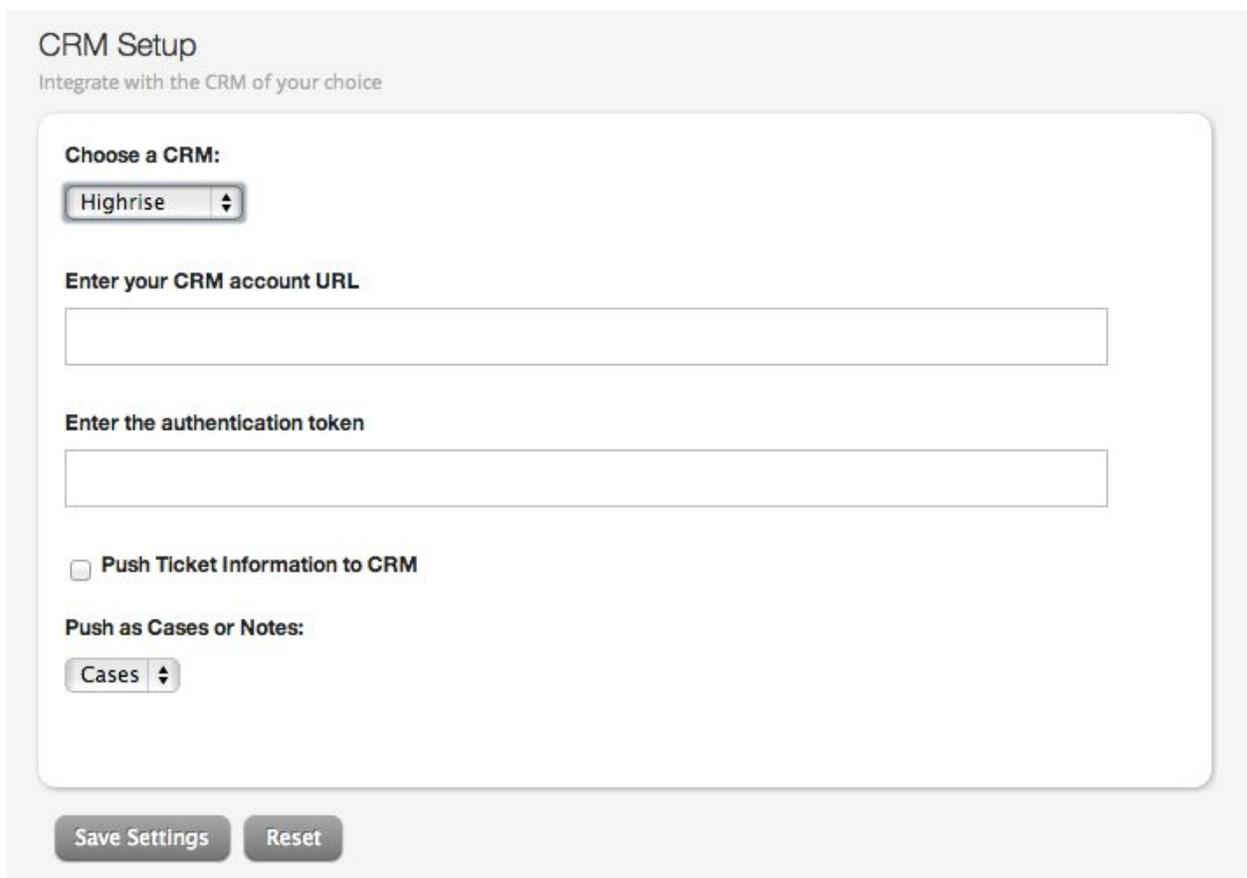
**Subject \***

**Message \***

With Highrise integration you can also push your ticket updates to Highrise contacts or company records as cases or notes respectively.

*Add ticket updates as Cases on Highrise contact information:*

1. When you enable Highrise integration in HappyFox, select "Cases" from the dropdown where you notify whether to "Push as cases or notes".
2. This setting will push the ticket as case in Highrise when a ticket is created in HappyFox. Please note that only the last update of the ticket will be displayed in Highrise.



The screenshot shows the 'CRM Setup' interface. At the top, it says 'CRM Setup' and 'Integrate with the CRM of your choice'. Below this, there is a section titled 'Choose a CRM:' with a dropdown menu currently set to 'Highrise'. Underneath, there are two text input fields: 'Enter your CRM account URL' and 'Enter the authentication token'. Below these fields is a checkbox labeled 'Push Ticket Information to CRM', which is currently unchecked. At the bottom of this section is another dropdown menu titled 'Push as Cases or Notes:' which is currently set to 'Cases'. At the very bottom of the interface are two buttons: 'Save Settings' and 'Reset'.

*Add ticket updates as Notes on Highrise Company information:*

1. When you enable HighRise integration in HappyFox choose "Notes" in the dropdown where you can notify whether to "Push as cases or notes".

2. The original message of the ticket and all ticket updates will be pushed as notes to HighRise.
3. Every note will be prefixed either by "Comment added by <HappyFox staff name or client name>" in HighRise.
4. By default the notes will be tagged to person corresponding to the email ID in HappyFox and if there is no person identified it will be tagged to company entity.

### CRM Setup

Integrate with the CRM of your choice

**Choose a CRM:**

Highrise ▾

**Enter your CRM account URL**

**Enter the authentication token**

**Push Ticket Information to CRM**

**Push as Cases or Notes:**

Notes ▾